Magento Community Edition

# User Guide

Version **1.8**

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# About This Guide

Welcome to the Magento Community Edition User Guide, which provides an overview of the Magento Community Edition (CE) eCommerce platform developed by Magento, Inc.

This guide is intended for web storeowners and first-time users of Magento CE. It provides a quick guide through the most important steps for getting your web store up and running and ready for selling online. The options described in this user guide enable you to generate a feature-rich and attractive eCommerce interface without the need for advanced technical expertise.

This guide first introduces Magento CE and its key concepts, and then describes how to install Magento CE. The following two chapters introduce the daily experience that a customer can have in a Magento web store and the daily management tasks that a storeowner would perform.

The rest of the chapters walk you through the process of setting up your Magento CE web store; customizing its behavior to your requirements; entering products; managing orders, invoices and shipments; and achieving the best turnover and profits from your web store.

# Support and Contact Information

We at Magento are dedicated to providing our customers with the best possible service. We would love to hear from you.

For feedback on this book and all other inquiries, please use our contact form at: http://www.magentocommerce.com/company/contact-us/

# Conventions Used in this Guide

The following style conventions are used in this document:

**Note:** This is a note.

**Tip:** This is a tip providing useful suggestions and information.

# 1 Introducing Magento Community Edition

This chapter introduces Magento Community Edition (CE), its basic components, and the workflow for using it.

## What is Magento CE?

Magento CE is a feature-rich eCommerce platform, built on open-source technology that provides online merchants with unprecedented flexibility and control over the look, content, and functionality of their eCommerce store. Magento CE's intuitive administration interface features powerful marketing, search engine optimization, and catalog management tools to give merchants the power to create sites that are tailored to their unique business needs. Designed to be completely scalable, Magento CE offers companies a stable, secure, customizable eCommerce solution.

## Magento CE License

Magento CE is licensed under the Open Software License (OSL) v3.0, an open source certified license. More information about Magento's licenses can be found at http://www.magentocommerce.com/license/

## Magento CE Frontend and Backend

The following sections provide an overview of the two visible interfaces of Magento CE: the frontend and the backend.

## Frontend (The Web Store Front)

The frontend is the public view of your web store with which your customers can interact through a standard web browser. It presents your products, product categories, and promotions, and provides your customers with ordering, payment, and purchase tracking features.

An example is shown in Figure 1.

Figure 1. Magento CE Frontend

## Backend (The Back Office)

The backend is the password-protected view of the back office features that enable a web store administrator to setup the products and purchasing options and to manage orders and all other store functionalities. You can navigate the Admin Panel using the menu on the top of the page (Magento top menu). A view of the backend is shown in Figure 2.

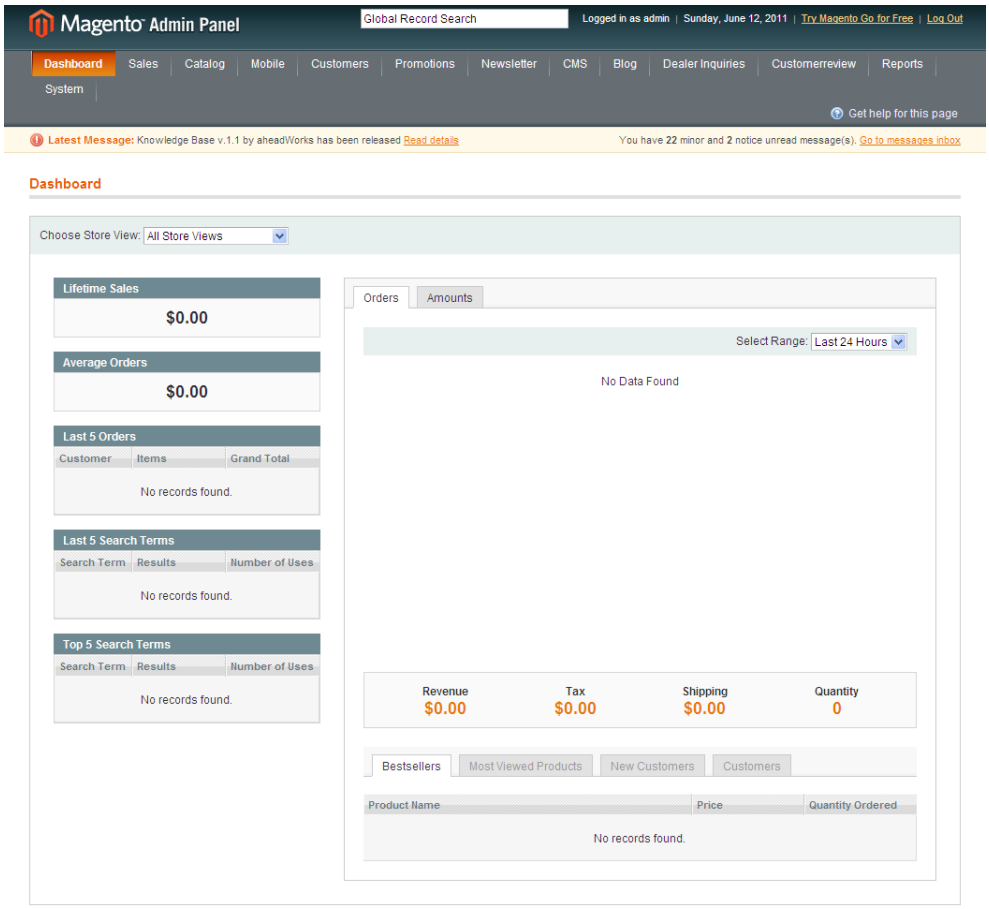



**Figure 2. Magento CE Backend**

# Magento CE Concepts

To use Magento CE effectively, you should be familiar with the following terms and concepts.

**Attribute**: A characteristic of a product. For example, an attribute of a digital camera could be "resolution," and the value of this attribute for a particular digital camera could be "10 megapixels." Customers can filter a list of products by values of one or more attributes.

**Attribute Group**: A logical grouping of attributes within an attribute set.

**Attribute Set**: A collection of attributes, customized to fit a certain type of product. For example, if you sell several different kinds of T-shirts on your website, you can create the T-shirts attribute set which will include the simple attributes commonly shared by all of your T-shirts. This may include color, size, gender, and brand.

**Bundle product:** This product is composed of components that are presented in different ways and are made from existing products. A good example of a bundle is a complete computer. For this computer, you can configure how much RAM or what kind of monitor is included with this computer in your store.

**Category:** A user-defined product classification. A category can have any number of levels of subcategories.

**Configurable product:** This product enables your customers to select the variant that they want by choosing options. For example, you can sell T-shirts in two colors and three sizes. You would have to create six variants as individual products (each with its own SKU) and then add these six to a **configurable product** where customers can choose the size and color, and then add it to their cart.

**Credit memo:** A credit memo is a statement of credits; for example, a credit for returned merchandise generates a credit memo. According to your store policy, you can apply the credit to future orders or refund the customer's payment method.

**Cross-sell:** Cross-sell products appear next to the shopping cart. When a customer navigates to the shopping cart page, these products are displayed as cross-sells to the items already in the shopping cart. They are similar to impulse buys, like magazines and candy at the cash registers in grocery stores.

**Downloadable product:** A product, such as a media file, that the customer downloads from the store after purchase. These downloadable files can reside on your server or be provided as URLs to any other server.

**Grouped product:** This option enables you to display several similar products on a single page. For example, if you are selling chefs' knives and you have the same knife in four sizes, you can make a **grouped product** to display all four of these sizes. Customers can select the size(s) that they want and add them to the cart from this page.

**Invoice**: An invoice in Magento CE represents a confirmation of payment. More than one invoice can be associated with a single order. If the products in an order are shipped in multiple shipments, then an invoice is generated for each shipment for the products in that shipment.

**Order**: An order is a request for goods.

**Order status:** The order status indicates where it is in the order cycle. In Magento CE, the system order status values are the following:

- **Pending** - Pending orders are brand new orders that have not been processed. Typically, these orders need to be invoiced and shipped.

- **On Hold** - The user cannot proceed to order processing if the order is in this state. This is convenient if, for example, some data must be verified.
- **Pending PayPal** (possible for PayPal orders only) - Pending PayPal orders are brand new orders that have not been cleared by PayPal. When using PayPal as a payment method, customers are redirected to the PayPal website. If they have not paid for the order, orders will be marked as **Pending PayPal**. It is not recommended to process these orders without referencing PayPal first to see if payment has been made.
- **Payment Review** - As long as an external payment gateway is verifying the payment information from a sales order, the order is assigned the **Payment Review** status both in the payment system and in Magento CE.
- **Processing** - Processing means that the order has been either invoiced or shipped, but not both.
- **Suspected Fraud** (possible for PayPal orders only) – The order transaction did not pass one or more of the PayPal fraud filters and the system receives the response from PayPal that the transaction is under review by Fraud Service
- **Complete** - Orders marked as complete have fully been invoiced and have shipped.
- **Canceled** - The order can be of this status if the customer calls your web store and asks to cancel an order if the order has not been paid for.

The store administrator can create custom order statuses, assign them to order states and set default status values for order states.

**Product type**: Magento CE classifies products as one of several predefined product types: Simple Product, Virtual Product, Downloadable Product, Grouped Product, Configurable Product, Bundle Product.

**Related product:** Related products are offered to the customer for purchase in addition to the item that the customer is viewing.

**Scope**: Scope describes the extent of your store hierarchy to which a given setting is effective. A setting can have a scope of **Global** (all websites, stores, and store views), **Website** (the selected website and all stores and store views under it), **Store** (the selected store and all store views under it), and **Store View** (the selected store view). Some settings that are set at a higher level can be overridden at a lower level.

**Search Engine Optimization (SEO):** The set of techniques and strategies that ensure that your site is listed prominently in search engine results, thereby increasing the likelihood that customers will find your site.

**Simple product:** This is the most basic product type. It is suitable for all kinds of physical (shipped) products.

**Shipment:** A shipment is a record of the products in an order that have been shipped. More than one shipment can be associated with a single order.

**Shopping cart:** The set of products that a customer has selected to purchase, but has not yet purchased.

**Store:** The second level of your store hierarchy. A website can have multiple stores (each, potentially, with its own root category), and a store can have multiple store views.

**Store View**: The lowest level of your store hierarchy. Typically, a store view is created for each locale or language. All store views under a given store share the same catalog. Customers use a drop-down list on the frontend to switch from one store view to another.

**Tax rule:** A combination of a product tax class, customer tax class, and tax rate. This rule defines which tax calculation is applied.

**Up-sell:** An up-sell item is one that is offered to the customer as an alternative to the product the customer is viewing. These products may be more expensive, of higher quality, or more popular, or produce a higher profit margin.

**Virtual Product:** This is a product that does not require shipping or inventory. It is generally used for warranties or services.

**Website:** The highest level of your store hierarchy. You can have multiple websites, and each website can have a different domain name. Websites can be set up to share customer data, or to not share data. Typically, each website has different lines of products and may have different customer bases.

# Advanced Magento CE Customization Options

The options described in this user guide can get you up and running with an extremely feature-rich and attractive interface without the need for technical expertise.

If you would like to take your web store one step further, Magento CE provides a variety of advanced options for customizing the look-and-feel and functionality of your site. These include:

- Custom Themes and Skins
- Extension Modules
- …and more.

See the Magento website at http://www.magentocommerce.com for a description of these options, as well as for access to resources that can assist you with their implementation.

# 2 Installing Magento CE

This chapter describes Magento CE system requirements and how to download and install it.

## System Requirements

The following provides a short list of the server requirements for running Magento CE properly. You can also view these specifications at: http://www.magentocommerce.com/system-requirements.

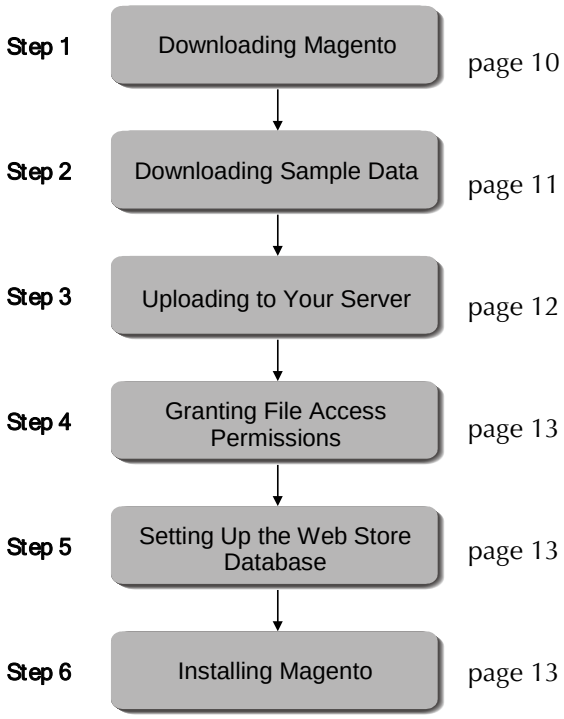
- **Supported Operating Systems:** Linux server x86, x86-64
- **Supported Web Servers:** Apache 1.3.x, Apache 2.x, Apache 2.2.x
- **PHP Compatibility:** 5.2.13 with Safe mode off and memory limit no less than 256 MB (preferably 512 MB)
- **MySQL:** 4.1.20 and InnoDB storage engine

If you are unsure whether your hosting company supports these specifications, please check with them or your company's system administrator. Alternatively, to download a script that verifies whether your server is compatible or not, refer to the following web page: http://www.magentocommerce.com/knowledge-base/entry/how-do-i-know-if-my-server-is-compatible-with-magento.

# Installing Magento CE

After you have verified that your hosting environment meets Magento's system requirements, as specified above, you can download and then install Magento to your server.

The following is the workflow for downloading and installing Magento:



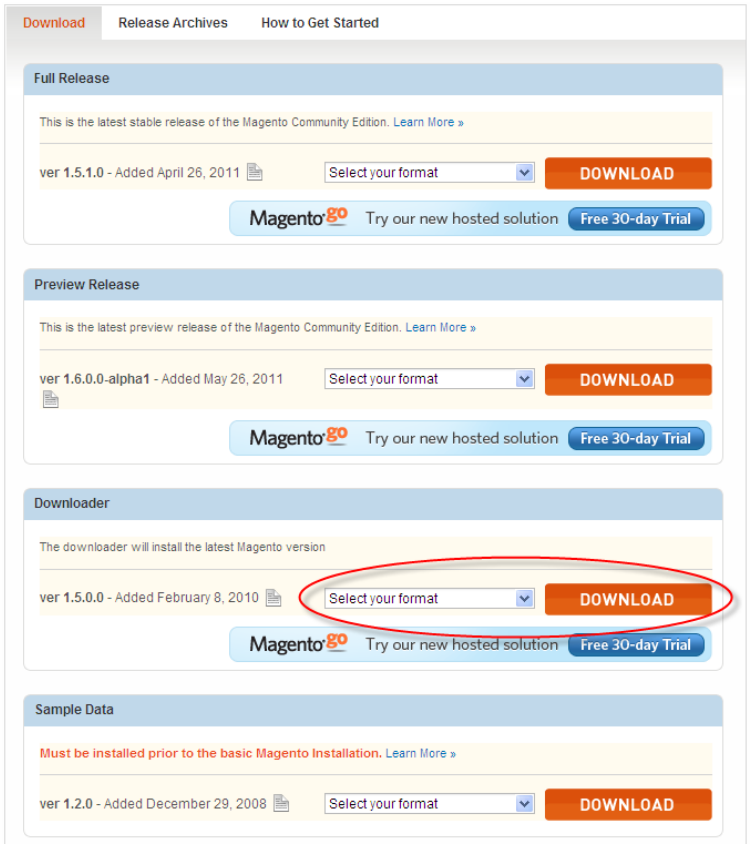

## Step 1: Downloading Magento CE

Magento CE can be downloaded free of charge from the Magento community site.

**Tip:** You can download Magento whether you have registered on the community site or not. We recommend registering so that you can later access the various valuable resources that the community has to offer, such as forums, a wiki, groups, and screencasts.

### To download Magento Community Edition:

1. Use your web browser to navigate to http://www.magentocommerce.com/download and log in, or go to http://www.magentocommerce.com and select **Downloads > Download Magento** to display Download page as shown in Figure 3.


Download
Release Archives
How to Get Started
Full Release
This is the latest stable release of the Magento Community Edition. Learn More »
ver 1.5.1.0 - Added April 26, 2011
Select your format
DOWNLOAD
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Try our new hosted solution
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Preview Release
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ver 1.6.0.0-alpha1 - Added May 26, 2011
Select your format
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Magento go
Try our new hosted solution
Free 30-day Trial
Downloader
The downloader will install the latest Magento version
ver 1.5.0.0 - Added February 8, 2010
Select your format
DOWNLOAD
Magento go
Try our new hosted solution
Free 30-day Trial
Sample Data
Must be installed prior to the basic Magento Installation. Learn More »
ver 1.2.0 - Added December 29, 2008
Select your format
DOWNLOAD

Figure 3. Magento Download Page (Magento Downloader)

**Note:** This page will appear slightly differently on the web after a newer version is released.

2. We recommend that you select the **Downloader** option, as shown above. The instructions in this chapter are written for the downloader.

   Multiple compressed formats are provided. If you are unsure which version to download, use the **.zip** format.

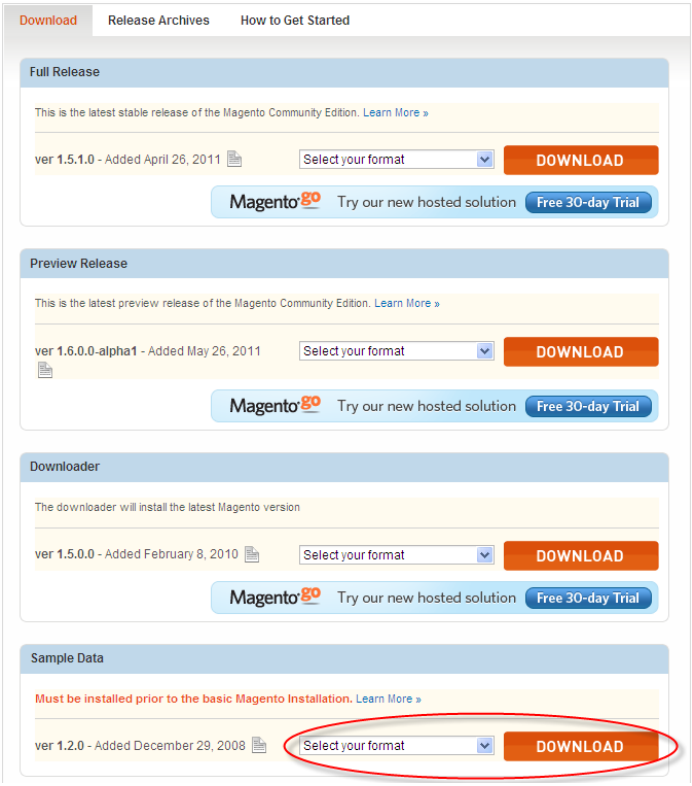
3. Click the **Download** button and save the file to the location of your choice.

## Step 2: Downloading Sample Data

Magento enables you to load a few basic products and information into your web store to populate your web store frontend and backend with some initial sample data. Even though you will later delete these products, it may help orient you while getting started. This step is recommended, but not mandatory.

### To download Sample Data for your Magento web store:

1. Navigate to http://www.magentocommerce.com/download and log in or go to http://www.magentocommerce.com and select **Downloads > Download Magento** from the menu to open the Download page as shown in Figure 4.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ver 1.5.1.0 - Added April 26, 2011
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ver 1.6.0.0-alpha1 - Added May 26, 2011
Select your format
DOWNLOAD
Magento go
Try our new hosted solution
Free 30-day Trial
Downloader
The downloader will install the latest Magento version
ver 1.5.0.0 - Added February 8, 2010
Select your format
DOWNLOAD
Magento go
Try our new hosted solution
Free 30-day Trial
Sample Data
Must be installed prior to the basic Magento Installation. Learn More »
ver 1.2.0 - Added December 29, 2008
Select your format
DOWNLOAD

Figure 4. Magento Download Page (Magento Sample Data)

**Note:** This page will appear slightly differently on the web after a newer version is released.

2. Select a format for downloading **Sample Data**. Multiple compressed formats are provided. If you are unsure of which version to download, then use the **.zip** format.
3. Click the **Download** button and save the file to the location of your choice.

## Step 3: Uploading to Your Server

After you have downloaded the Magento downloader and Magento Sample Data, you must upload these packages to your server.

### To upload to your server:

1. The file names are: **magento-downloader-x.x.x.zip** (or **.tar.gz** or **.tar.bz2**, depending on the format that you downloaded) for the Magento downloader and **magento-sample-data-x.x.x.zip** for the Magento Sample Data. Extract (unzip) the files to a directory of your choice.
2. Use your favorite FTP/SFTP program to copy the contents of the **`magento`** folder from the Magento downloader package to the server's root WWW directory (which is usually named **`public_html`**) or any other subdirectory of your choice, such as **/store**.

## Step 4: Granting File Access Permissions

The top-level Magento directory on the server (the directory to which you uploaded the decompressed files) and all Magento directories under it must have the correct permissions in order for the Magento Installer to operate properly.

For instructions on setting file permissions, see the following Knowledge Base article:

http://www.magentocommerce.com/knowledge-base/entry/ce18-and-ee113-installing#install-privs

## Step 5: Setting Up the Web Store Database

### To create and set up the database to be used by your web store:

1. Using a database management application such as **phpMyAdmin**, or a tool provided by your hosting provider, create a new, empty database and assign users and permissions to it.
2. If you want to use the sample data, do the following:
    a. Using an FTP or SFTP tool, transfer the extracted sample data file to a directory on the server. The file name will be similar to **magento_sample_data_for_x.x.x.sql**.
    b. Use the database management tool to import the file **magento_sample_data_for_x.x.x.sql** into this new database.
    c. To add sample images to the sample products in your store, copy the contents of the **Media** folder from the **Sample Data** package onto the new **Media** folder on your server

*You are now ready to install Magento!*

## Step 6: Installing Magento CE

In this step you install Magento CE using the Downloader tool.

### To install Magento:

1. Use a standard web browser to navigate to the location on your server where you uploaded the Magento downloader. If everything has been set up correctly as described up until now, the Magento Installation Wizard Welcome page is displayed, as shown in Figure 5.

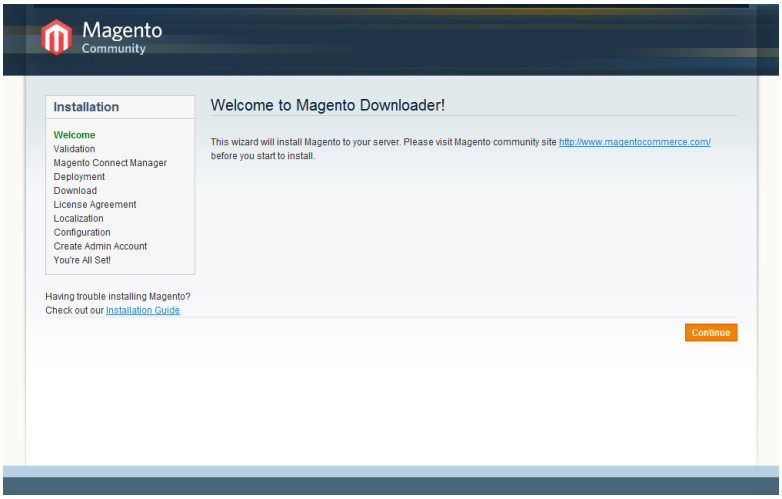



Figure 5. Magento Downloader Welcome Page

2. Click **Continue** to proceed to the Validation page, as shown in Figure 6.

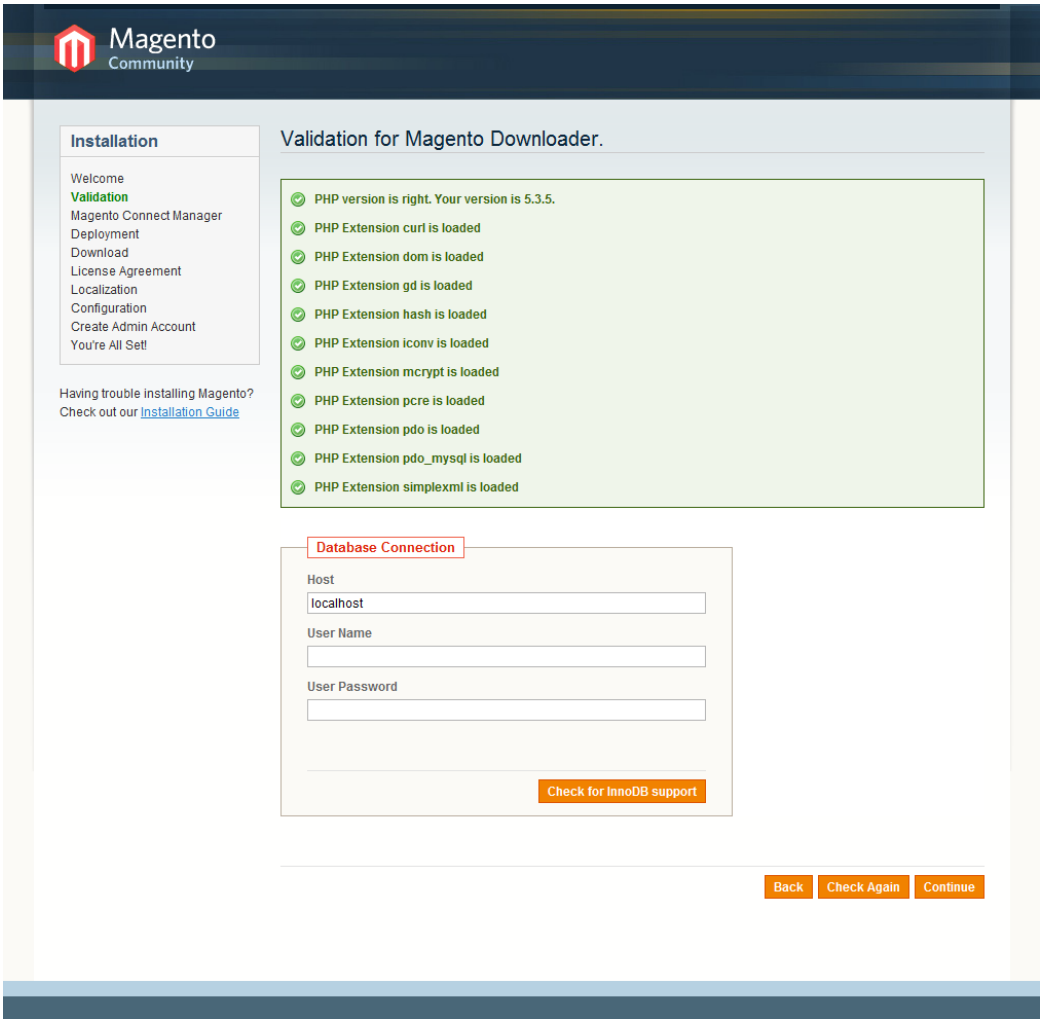



Figure 6. Magento Downloader Validation Page

This page tests your environment to determine if it will support Magento. If error warnings are displayed, correct the errors and click **Check Again**.

3. When there are no more errors, specify the host, user name, and user password for the database server in the Database Connection box. To check the authorization data for connecting to the database server and to the data storage, click the **Check InnoDB support** button. The installation will not proceed if the information entered in any of these fields is invalid.

4. Click **Continue** to proceed to the Magento Connect Manager Deployment page.

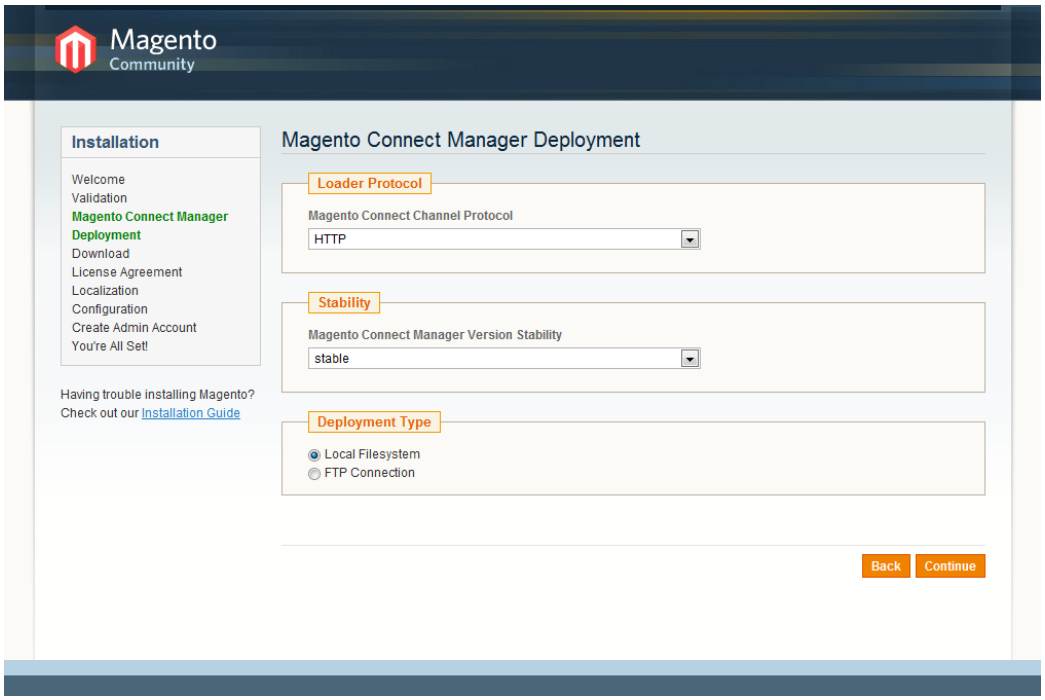



Figure 7. Magento Downloader Connect Manager Deployment Page

5. Choose whether Magento Connect Manager will be downloaded via the **HTTP** or the **FTP** protocol. We recommend that you choose **HTTP** because it takes less time than using the FTP protocol. If outgoing HTTP connections are not allowed in your hosting environment, then choose **FTP**.

6. In the **Magento Connect Manager Version Stability** drop-down list, select the Stable option. The available options are stable, beta, or alpha.

7. For Deployment Type, select either **Local Filesystem** or **FTP Connection** to indicate whether Magento Connect Manager will be deployed on your file system or via an FTP connection. We recommend that you deploy using FTP. Deploying Magento Connect Manager through the FTP connection resembles the process of a customer personally uploading files on the server and it does not require changing permissions for reading, writing, and executing files. With file system deployment, because of the permissions that the Apache account provides when deploying this way, deployed files are more vulnerable to permissions problems. In this case, you should contact the server administrator in order to change the file permissions after the installation is completed.

**Note**: The **Local Filesystem** option will be unavailable if the system account of the web server does not have permission to write to the directory when Magento CE is installed.

If you select the **FTP Connection** option as a deployment type, a number of other options become available, including the host name of the FTP server and the credentials for connecting to the FTP server. For these fields, use the values that were provided by the FTP server administrator. In the **Installation Path** field, specify the path to where Magento CE will be installed. (This should be the same directory into which you uploaded the `downloader.php` file.)
To check the connection to the FTP server, click **Check FTP**. If any of the FTP parameters under Deployment Type is invalid, Magento Connect Manager will not be deployed via FTP.

8. Click **Continue** to install the Magento Connect Manager.
9. When you see the message "Magento has been downloaded successfully," click **Continue** to proceed to the Installer wizard.

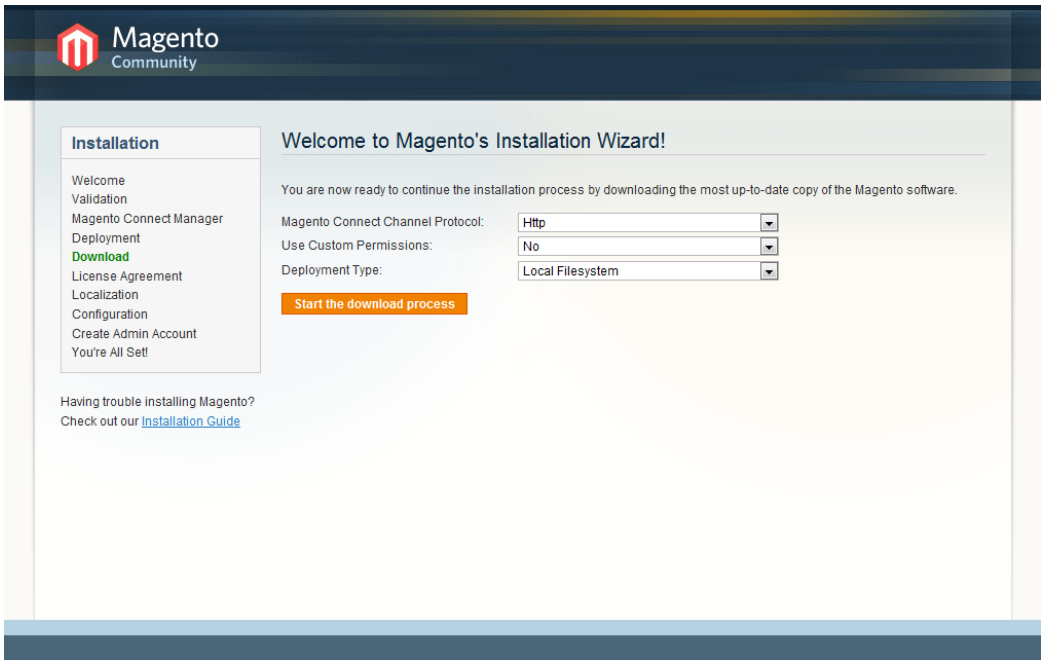



**Figure 8. Magento Installation Wizard Welcome Page**

10. In the **Magento Connect Channel Protocol** drop-down list, select the same protocol that you selected in step 5.
11. In the Custom Permissions field choose how the execute, read, and write permissions will be applied to the Magento downloaded folders and files on the server.

- **Yes** – The Magento CE administrator will be able to execute, write, and read files in the downloaded folders. In the **Folders** and **Files** fields that appear, specify values in the octal number system which will denote the permissions that the Magento administrator will have for folders and files, respectively, on the server.
- **No** – custom permissions are not specified for downloaded folders and files. In this case the system default values are used:
  - For folders – 0777 (permissions for read, write, and execute)
  - For files – 0666 (permissions for read and write)

12. Select the **Deployment type** that you selected in step 7. The types must match or an error will occur during installation.

13. Click **Start the download process.** A series of messages is displayed to indicate the progress of the download process, as shown in Figure 9.

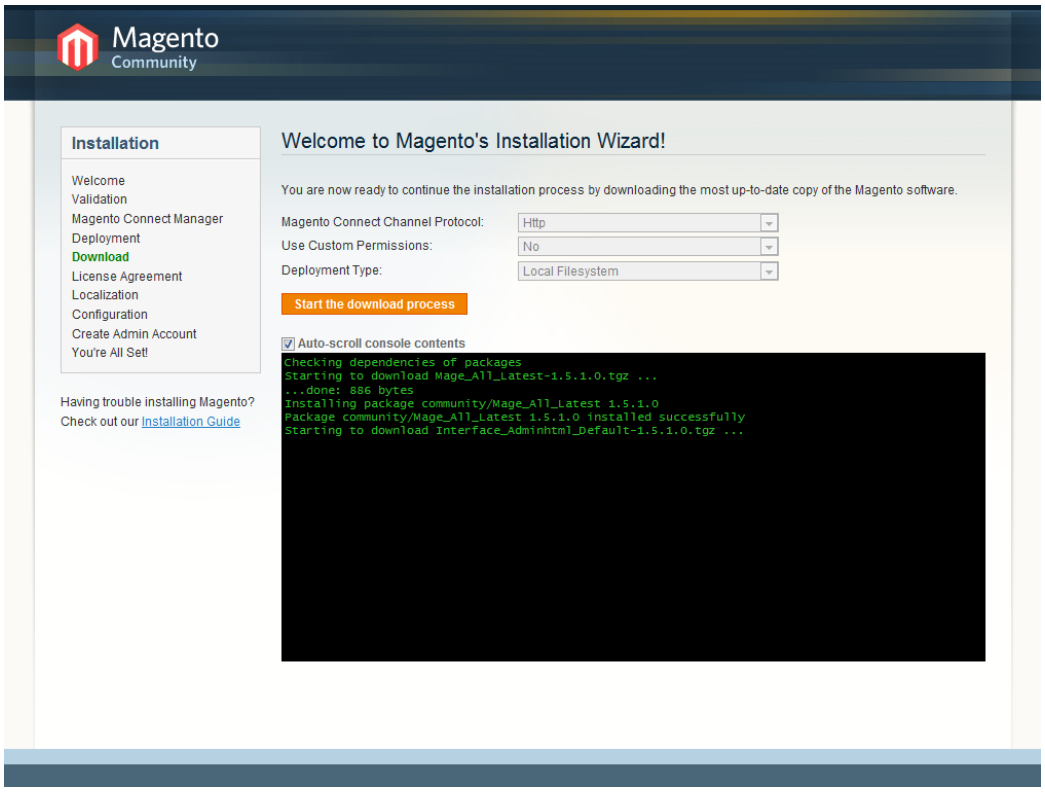
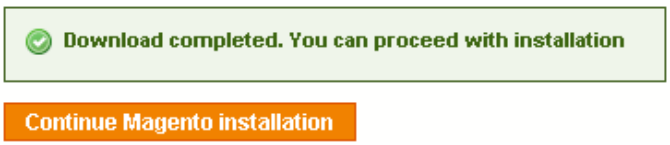



Figure 9. Installation Progress

After this is completed, the following message is displayed at the bottom of the page:



**Note:** If you were unable to complete the download process through this interface due to a connection error, try to upload the Full Magento Package from the Community download page.

14. Click **Continue Magento installation** to proceed.

15. Read and agree to the terms of Magento's license. More information is provided about this subject in the *Magento License* section on page 3. Click **Continue**.

16. On the Localization page (Figure 10), select your locale, time zone, and default currency. These are default values for any web stores and web store views you create; when you set these up, you can select localization preferences for each one.

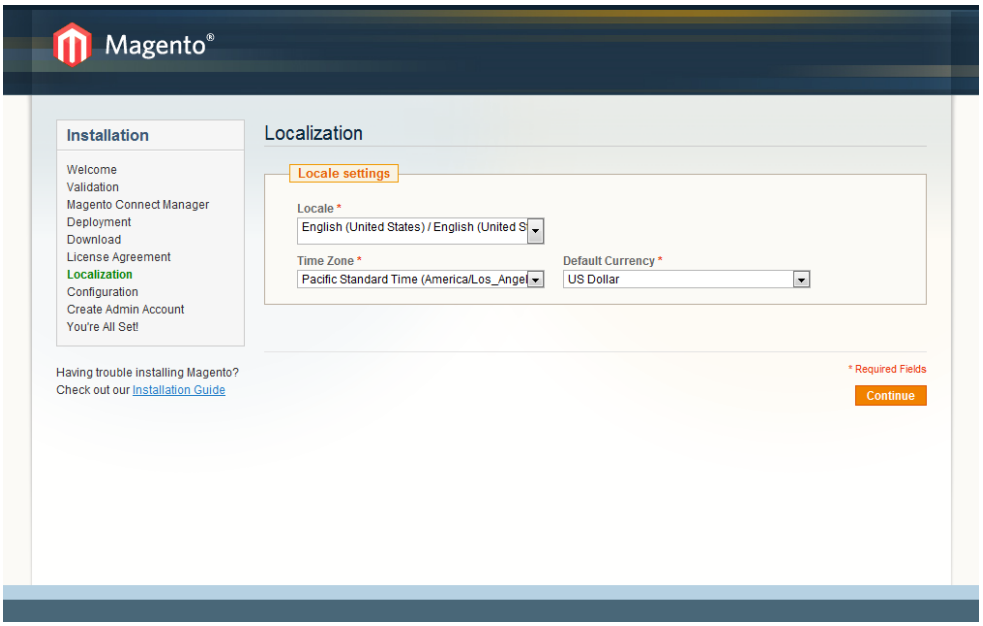



Figure 10. Magento Installation Wizard Localization Page

**Note:** Localization settings can be changed later if needed.

Click **Continue** to proceed to the next page.

17. On the Configuration page (Figure 11), change the default values as needed according to your requirements and database information.

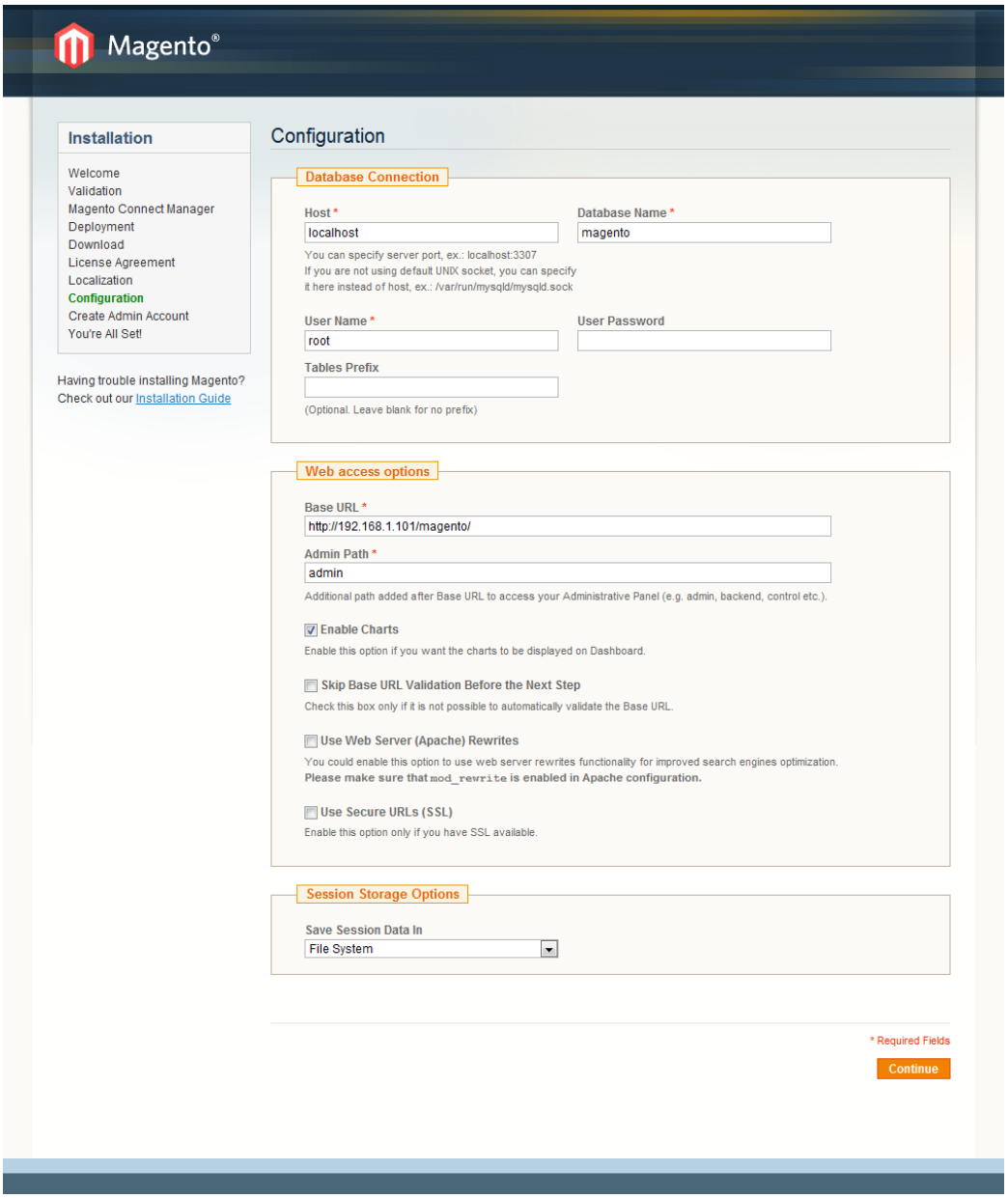

Magento®
Installation
Welcome
Validation
Magento Connect Manager
Deployment
Download
License Agreement
Localization
Configuration
Create Admin Account
You're All Set!
Having trouble installing Magento?
Check out our Installation Guide
Configuration
Database Connection
Host *
localhost
You can specify server port, ex.: localhost:3307
If you are not using default UNIX socket, you can specify
it here instead of host, ex.: /var/run/mysqld/mysqld.sock
Database Name *
magento
User Name *
root
User Password
Tables Prefix
(Optional. Leave blank for no prefix)
Web access options
Base URL *
http://192.168.1.101/magento/
Admin Path *
admin
Additional path added after Base URL to access your Administrative Panel (e.g. admin, backend, control etc.).
Enable Charts
Enable this option if you want the charts to be displayed on Dashboard.
Skip Base URL Validation Before the Next Step
Check this box only if it is not possible to automatically validate the Base URL.
Use Web Server (Apache) Rewrites
You could enable this option to use web server rewrites functionality for improved search engines optimization.
Please make sure that mod_rewrite is enabled in Apache configuration.
Use Secure URLs (SSL)
Enable this option only if you have SSL available.
Session Storage Options
Save Session Data In
File System
* Required Fields
Continue

Figure 11. Magento Installation Wizard Configuration Page

The first two options make purchasing and administration more secure. Usually, you can leave the other options as they are.

We strongly recommend setting the following options if your server has an SSL certificate installed:

- Select the **Use secure URLs (SSL)** check box; additional settings become available to configure this option.
- Specify the complete base URL for the SSL connection in the **Secure Base URL** field and select the **Run the admin interface with SSL** check box.

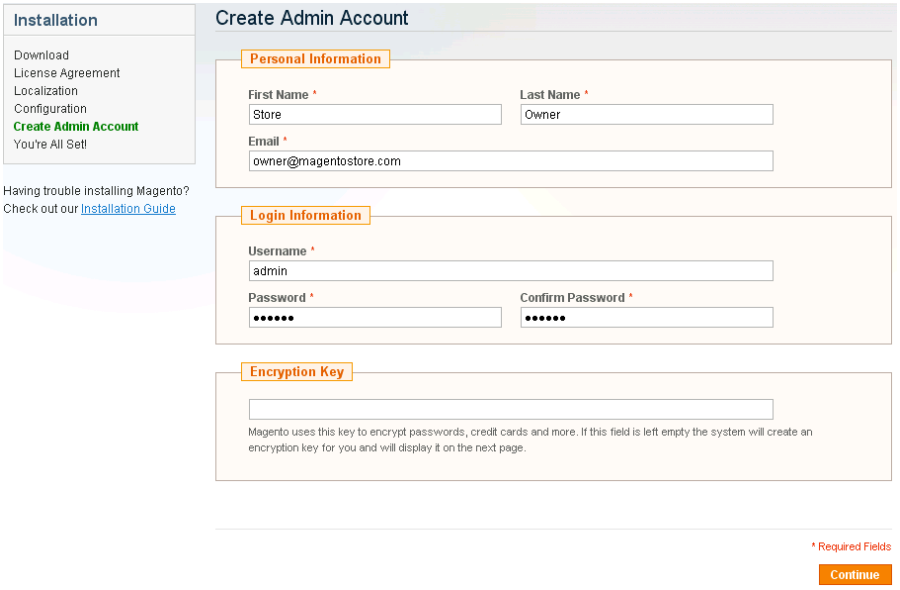
We also recommend selecting the **Use Web Server (Apache) Rewriters** option.

**Note:** SSL settings can be changed later if needed.

When you are finished, click **Continue**.

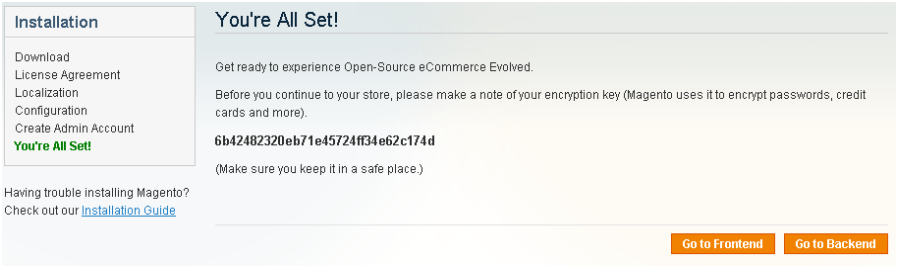
18. The Create Admin Account page enables you to specify access information, as follows:

- Specify the administrator's name and email.
- Create a user name and password.
- Specify the encryption key, or Leave the **Encryption Key** field empty to display the key on the next page.




Click **Continue** to proceed to the next page.

19. The You're All Set page shows your encryption key.


Installation
Download
License Agreement
Localization
Configuration
Create Admin Account
You're All Set!
Having trouble installing Magento?
Check out our Installation Guide
You're All Set!
Get ready to experience Open-Source eCommerce Evolved.
Before you continue to your store, please make a note of your encryption key (Magento uses it to encrypt passwords, credit cards and more).
6b42482320eb71e45724ff34e62c174d
(Make sure you keep it in a safe place.)
Go to Frontend
Go to Backend

**Tip:** Write down the encryption key and keep it in a safe place. If you need or want to move your store data to a new Magento CE site, you will need this encryption key to recover the encrypted data.

*Congratulations! You have now completed the installation of Magento CE!*

**Note:** If you want to run through the Setup Wizard again, you do not have to download all the Magento CE files again. Simply delete the `app/etc/local.xml` file and any files and directories in the `var/` directory.Go back to *http://www.yourDomain.com/magento-directory* with your browser. The Setup Wizard will run automatically again.

You can visit your new Magento storefront by selecting the **Go to Frontend** button or by specifying the URL of your store in your browser.

You can also access the administration backend and begin configuring your new web store, as described in the *Accessing the Backend* section on page 23.

**Tip:** You can easily open the backend by clicking the **Go to Backend** button on the last page of the Magento Installation Wizard, shown above. We recommend that you bookmark this page for easy access.

**Tip:** The process described above sets you up with a single website, single store and three store views for different languages. This is most probably all you need. However, if you would like to create a more sophisticated web store with multiple options, then see "Setting Up Your Store Hierarchy," page 127.

# 3 Basic Configuration

This chapter describes how to configure the basic information for your web store. The other aspects of your web store to be configured are described in the subsequent chapters of this guide.

## Accessing the Backend

All of the basic configuration tasks are performed in the Magento CE backend. The following describes how to access and log in to the Magento CE backend.

**Tip:** Immediately after you install Magento CE, you can easily open the backend by clicking the **Go to Backend** button on the last page of the Magento Installation Wizard. We recommend that you bookmark the backend page for easy access.

### To access the Magento backend administration environment:

1. Use a standard web browser to navigate to the backend by entering the URL that you specified in the Magento Installation Wizard with the addition of the suffix **/admin** (or the one that you specified during installation). For example, if you specified **mywebstore.com** as the base URL, then use http://www.mywebstore.com/admin to access your backend.

   **Note:** The Magento CE Demo Store backend can be accessed at: http://demo-admin.magentocommerce.com/admin

   The Log in to Admin Panel page is displayed, as shown in Figure 12.

**Figure 12. Backend Login Page**

2. Log in using the user name and password that you created during the installation process.

   **Note:** The backend of the Magento Demo Store can be accessed using the **User Name: admin** and **Password: 123123**

3. Click the **Login** button to display the administration panel, as shown in. Figure 13.

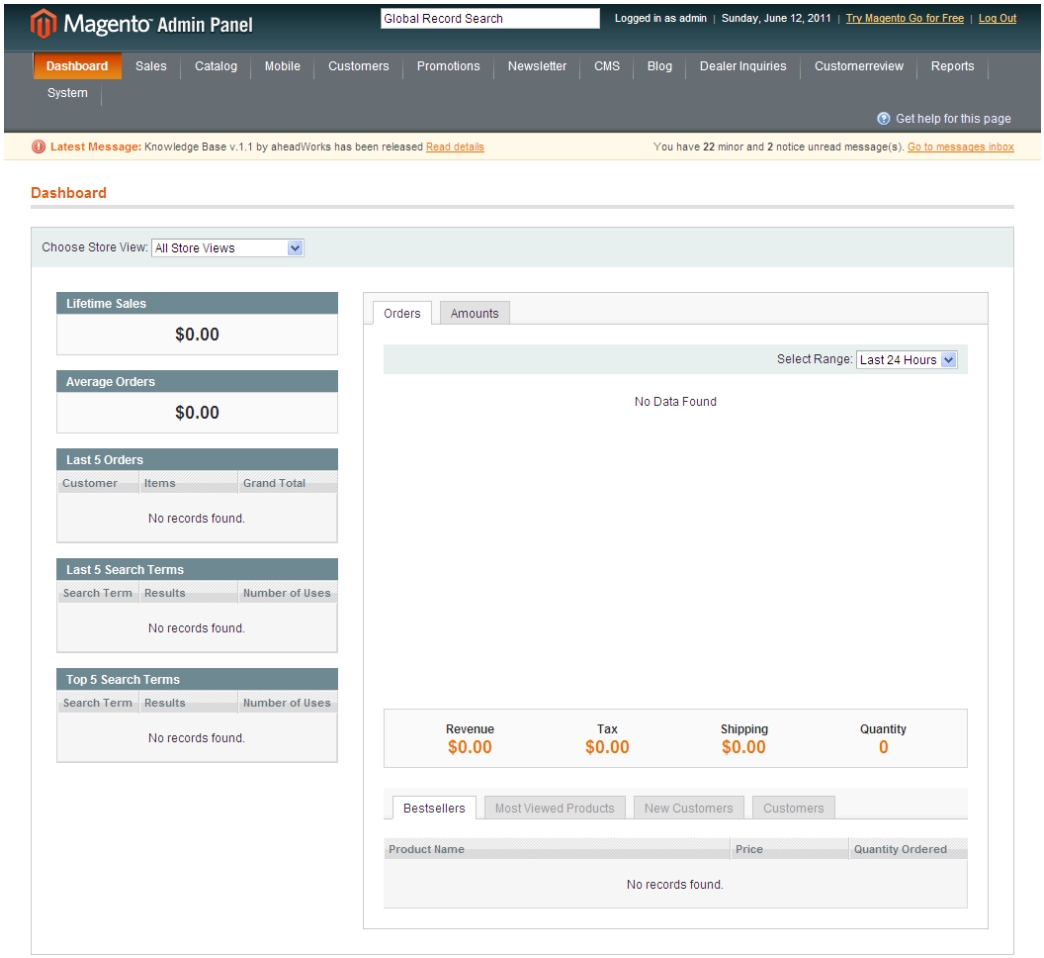



Figure 13. Magento CE Backend

4. After you log in, the Magento messages that you have not yet read are displayed, such as the one shown in Figure 14.

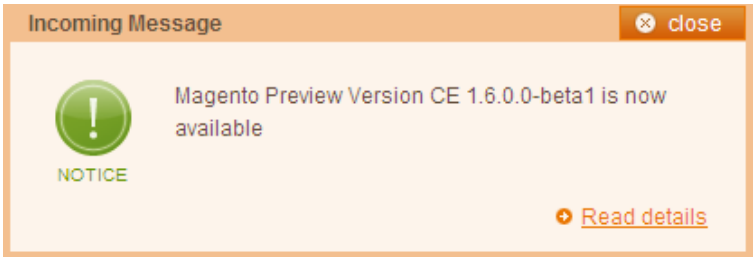



Figure 14. Incoming Message Notice

Additionally, information about other messages is shown in a bar just under the menu (see Figure 15). See “Managing Administrator Messages,” page 60, for more information about managing these messages.


Latest Message: Knowledge Base v.1.1 by aheadWorks has been released Read details
You have 22 minor and 2 notice unread message(s). Go to messages inbox

Figure 15. Message Bar

# Store Hierarchy

Among the first things you will want to do is plan your store hierarchy, that is, the arrangement of websites, stores, and store views. When Magento CE is installed, a "Main Website," a default store, and a default store view are created. You will want to create additional websites, stores, and store views, depending on the breadth of the items you are selling and the composition of your target markets.

To be able to create these entities, you need to create at least one root category first. See "Managing Categories," page 77, for more information about creating root categories. For now, determine how you want your store hierarchy set up.

## Websites

Suppose you want to sell machine shop equipment online, and your spouse wants to sell handmade baskets. It is unlikely that you would sell both of these product lines in a single store, but in a single Magento CE installation, you can do both by setting up separate websites. Each website can have its own domain name. The websites can be set up to share customer data, or not to share any data.

## Stores

For your handmade baskets website, you might want to set up two stores, one specializing in wicker and one for other materials. You can set up two root categories (one for wicker items and one for other items) and assign one to each store. (See "Managing Categories," page 77, for more information about setting up root categories). Several stores of one website can have different independent domain names as well, but it should be configured on the store view level of each store.

## Store Views

Your market research indicates that about half of your potential customer base speaks English, and the other half speaks Spanish. Within each store, you can create separate store views, one for English and one for Spanish. The store views share the same catalog, but each is presented in its respective language. Customers use a drop-down list on the frontend to switch from one store view to another.

# Store Pages General Configuration

This section describes how to configure general aspects of your frontend pages. These configurations are performed in the Configuration area of the Admin Panel.

To access the Configuration section, select **System > Configuration**. The tabs in the left column provide access to configuration options for different aspects of your Magento CE instance. The Current Configuration Scope drop-down list in the upper left corner of the page enables you to select the hierarch level (website, store, store view) to which the configuration will be applied. To apply configuration settings at the global level (that is, for all your websites, stores, and store views), leave **Default Config** selected.

To open the options for configuring your store pages design click the **Design** tab in the left column. The Design page opens with a number of field sets.

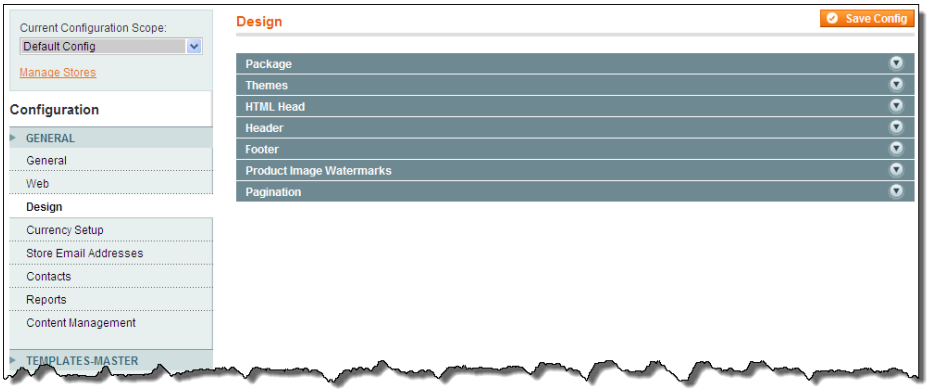



Figure 16. Design Configuration Page

## HTML Head Field Set

The settings in the **HTML Head** field set on the Design tab are used to define general information about your store's pages. These settings may not be visible to your customers, but they are important for things such as traffic analytics and search engine optimization.

### To define general page features:

1. Click the **HTML Head** heading to expand the field set as shown in Figure 17.

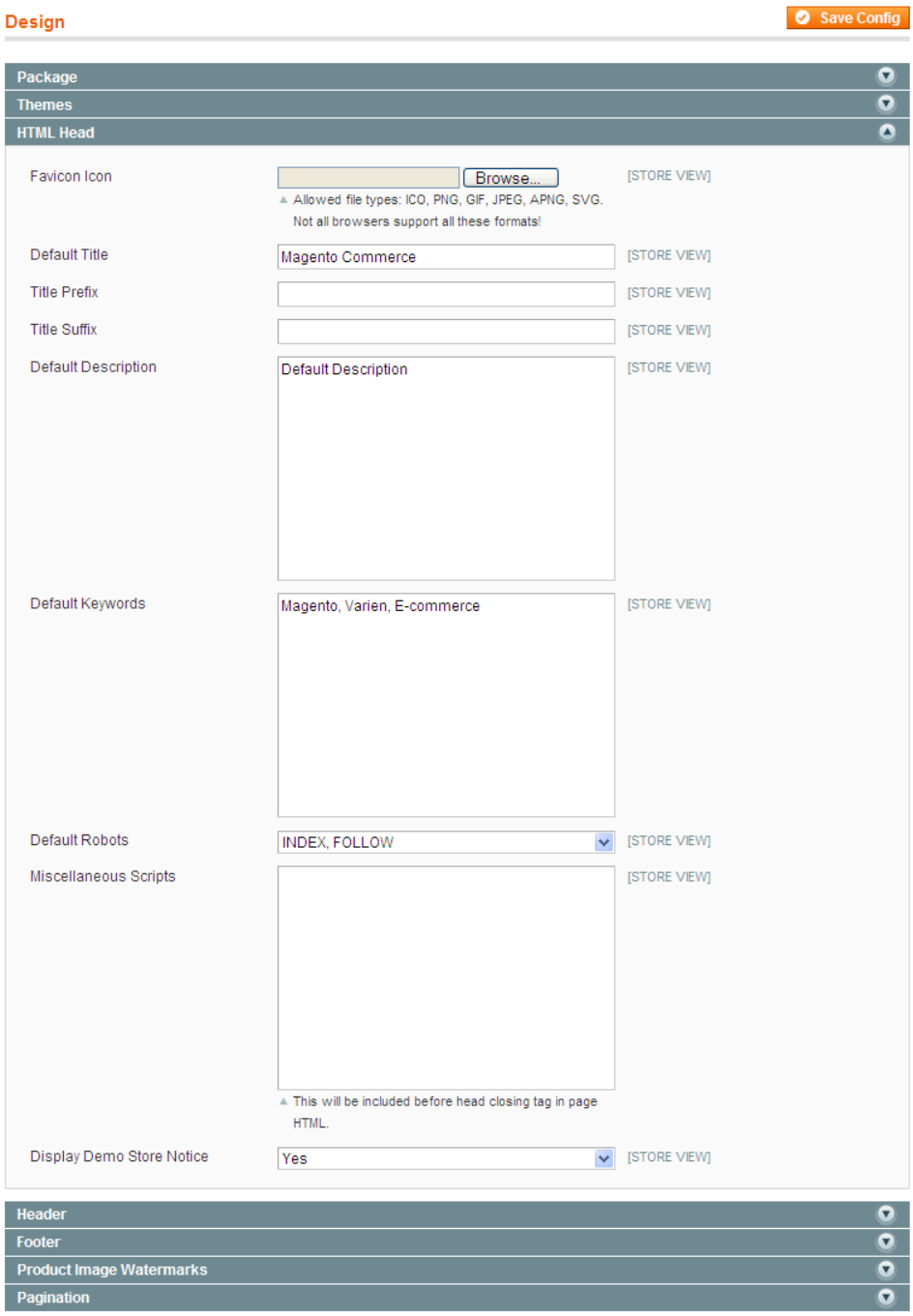



Figure 17. HTML Head Field Set

**Note:** The words in square brackets (for example, *[STORE VIEW]*) indicate the scope of the associated option.

2. Click the **Browse** button and select an icon file (on your local computer) to use as a "favicon." This small icon appears in the address bar of your customers' browsers.
3. In the **Default Title** field, specify the page title to be displayed in browsers for those pages that do not have their own title. This information is also used to improve search engine visibility and performance.

4. In the **Title Prefix** and **Title Suffix** fields, specify a prefix and a suffix to be appended to the pages of your web store that have their own title, such as a prefix of **My Web Store**.
5. In the **Default Description** and **Default Keywords** fields specify words that describe your web store to be used by search engines when page-specific information is not provided. Keywords must be separated by commas.
6. Optional. Select **Display Demo Store Notice** to display a notice at the top of every page that indicates that this is a demo store and that no transactions will be processed. This option is useful while you are setting up your store prior to opening for business.
7. Click the **Save Config** button on the top right of the page.

## Header Field Set

The options on the **Header** field set define the look of the top of each page in your store.

### To define the header of each web store page:

1. Click the **Header** tab to expand the section as shown in Figure 18.

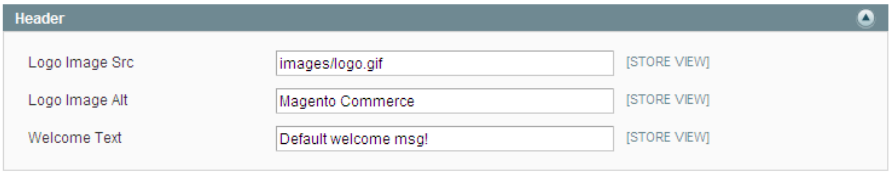



**Figure 18. Header Field Set**

2. In the **Logo Image Src** field, specify the logo graphic file to appear on the top left of each page of your web store, as shown in Figure 19 for the Magento Demo Store. Make sure that you name your logo something other than **logo.gif,** so it does not get overwritten in future upgrades.

**Figure 19. Page Header Section**

**Note:** You will need to upload the image file using an FTP client to the **skin/frontend/default/default/images/** directory or to your own skin folder in your Magento CE installation.

3. In the **Logo Image Alt** field, specify the alternative text to be displayed when your customers hover their mouse cursors over the logo image in your web store.
4. In the **Welcome Text** field, specify the welcome message to be displayed on the top right of your web store for customers that are not logged in, as shown in Figure 19.
5. Click **Save Config** to save your changes.

## Footer Field Set

The options in the **Footer** field set define what is displayed at the bottom of each web page in your store.

### To define the footer of your web store pages:

1. Select the **Footer** option to expand the page to display the footer options, as shown in Figure 20.

**Figure 20. Footer Field Set**

2. In the **Copyright** field, specify your web store's copyright information.
3. In the **Miscellaneous HTML** field, specify the custom HTML code to be added to the end of the page code that is generated by Magento CE. This area is usually used for adding tracking scripts that track your customers' activity on the site.
4. Click **Save Config** to save your changes.

# Store Contacts Configuration

This section describes how to configure store email addresses that are used for internal and external email communications and the Contact Us feature.

## Web Store Emails

The Store Email Address page of the system configuration enables you to specify email addresses and contact names to be used when sending email to customers upon registration and at all steps of the order lifecycle. These email address are also used for sending error reports to the store administrator.

### To define web store email addresses:

1. In the Admin panel, select **System > Configuration >** GENERAL **>Store Email Address.** Here you can configure the various email addresses used for sending emails from your web store to your customers.

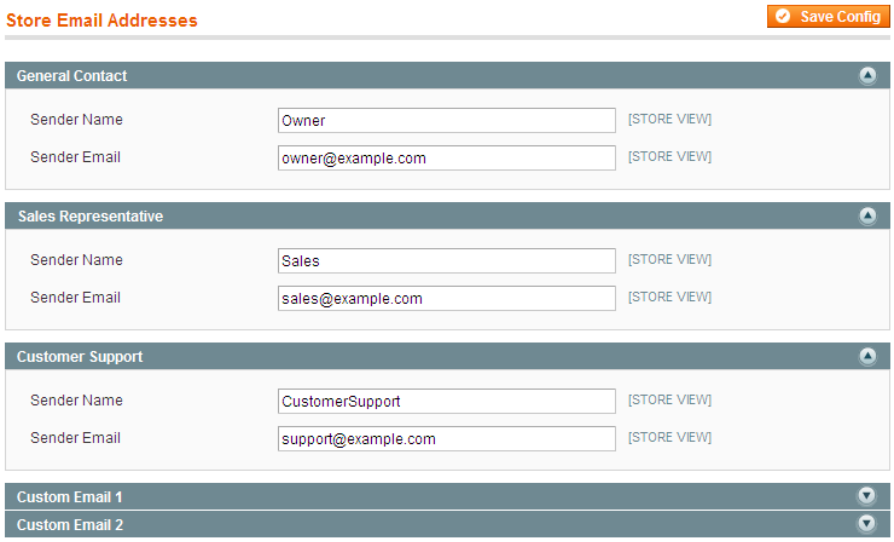



Figure 21. Store Email Addresses Page

2. In the **Current Configuration Scope** drop-down list in the left upper left corner, select the scope for which you want these configurations to apply. All fields on this page can have different values for each store view.
3. In each **Sender Name** field, specify the name of the sender or department from which the emails are sent.
4. In the **Sender Email** field specify the email address used for sending the emails.
5. Click **Save Config** to save your changes.

**Note:** See "Customizing Transactional Emails," page 181, for more information about emails.

## Contacts

These options define the email to which customers send requests when using the **Contact Us** option at the bottom of the pages of your web store.

### To define your web store contact information:

1. In the Admin Panel, select **System > Configuration >** GENERAL **>Contacts** to display the Contacts page, as shown in Figure 22.

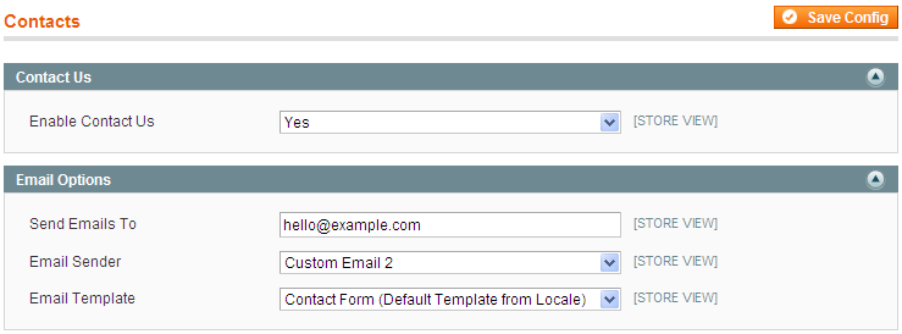



Figure 22. Contacts Page

2. In the **Current Configuration Scope** drop-down list in the left upper left corner, select the scope for which you want these configurations to apply.
3. In the **Enable Contact Us** drop-down list, select **Yes** to enable customers to contact you by email with the **Contact Us** link, or select **No** to disable this communication method.
4. In the **Send Emails To** field, specify the email that is used for receiving feedback when a customer uses the **Contact Us** option in the store.
5. In the **Email Sender** drop-down list, select the email address from which feedback messages are sent.
6. In the **Email Template** drop-down list, select the template to be used for the Contact Us form displayed on the frontend. You can create custom email templates. For more information, see "Customizing Transactional Emails," page 181.
7. Click **Save Config** to save your changes.

## Sales Emails

You can configure Magento CE to send emails that confirm an order, invoice, shipment, or credit memo to both registered customers and store guests.

### To configure sales emails sent to customers:

1. In the Admin Panel, select **System** > **Configuration** > SALES > **Sales Emails**.
2. In the **Current Configuration Scope** drop-down list in the left upper left corner, select the scope for which you want these configurations to apply.
3. Click the **Order** heading to expand the Order field set, as shown in Figure 23.

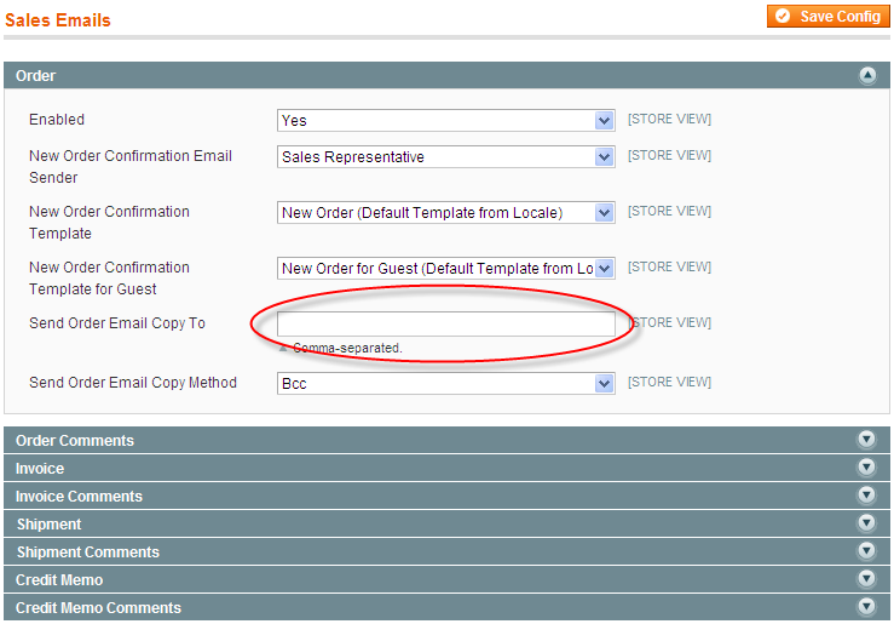



**Figure 23. Sales Emails Page**

4. In the Order field set, configure the following options:
   - In the **Enabled** drop-down list, select **Yes** to enable new order confirmation emails to be sent.
   - In the **New Order Confirmation Email Sender** drop-down list, select the email address to be used for sending the new order confirmation.
   - In the **New Order Confirmation Template** drop-down list, select the template to be used for the for the order confirmation emails sent to registered customers.
   - In the **New Order Confirmation Template for Guest** drop down- list, select the template to be used for the for the order confirmation emails sent to guest customers.
   - In the **Send Order Email Copy To** field, specify the email address to which a copy of the new order confirmation email is sent. This feature helps you to keep track of the new orders that come in.
5. Configure the options on the other field sets on this page.
6. Click **Save Config** to save your changes.

# Shipping Settings

This section describes how to specify shipping options, such as the origin used for shipping rate calculations and whether to enable the multiple shipping destinations feature.

Configuring shipping settings and shipping methods enables you to provide customers a selection of shipping methods with shipping rates during checkout. Magento CE includes extensive integration with major shipping carriers; for USPS, DHL, FedEx, and UPS you can create shipment orders and print shipping labels right from the Magento CE Admin Panel. See "Shipping," page151, for details about shipping system integration.

### To define general shipping options:

1. In the Admin Panel, select **System** > **Configuration** > SALES > **Shipping Settings**.
2. In the **Current Configuration Scope** drop-down list in the left upper left corner, select the scope for which you want these configurations to apply.
3. Click the **Origin** and **Options** tabs to expand the page to display the shipping options, as shown in Figure 24.

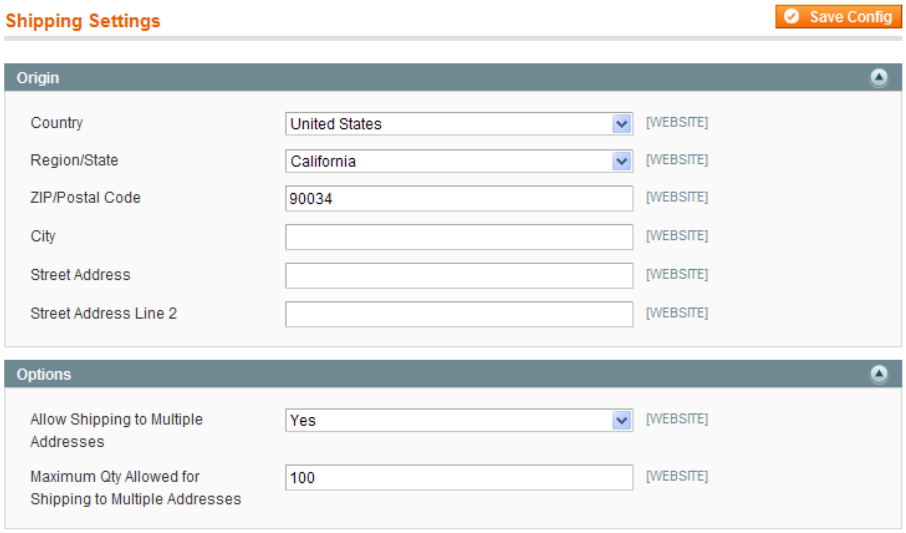



**Figure 24. Shipping Settings Page**

4. Configure the options to match your store.
5. Click **Save Config** to save your changes.

See "General Shipping Settings," page 151, for details about configuring shipping methods.

# Cookie Restriction Mode

Magento can notify store customers about cookies that are being used by a. The feature is called Cookie Restriction Mode. It is aimed at helping store owners to comply with the European Union Privacy and Electronic Communications Directive and its amendment. According to these documents, websites cannot use cookies until a user consents.

# Enabling and Configuring Cookie Restriction Mode

To enable the cookie restriction mode:

1. Log in to the Magento Admin Panel.
2. Navigate to **System** > **Configuration** > GENERAL > **Web**.
3. In the **Current Configuration Scope** in the upper-left corner of the page select the desired website.
4. Expand the **Session Cookie Management** filed set.
5. In the **Cookie Restriction Mode** field select **Yes**.
6. To save the changes click the **Save Config** button.

# Cookie Restriction Mode: Implementation Details

After the cookie restriction mode is enabled, a message is displayed on the top of each page in the store front. The message informs customers that the website requires cookies to provide all of its features and requests users to confirm that they are informed and consent. See Figure 25.

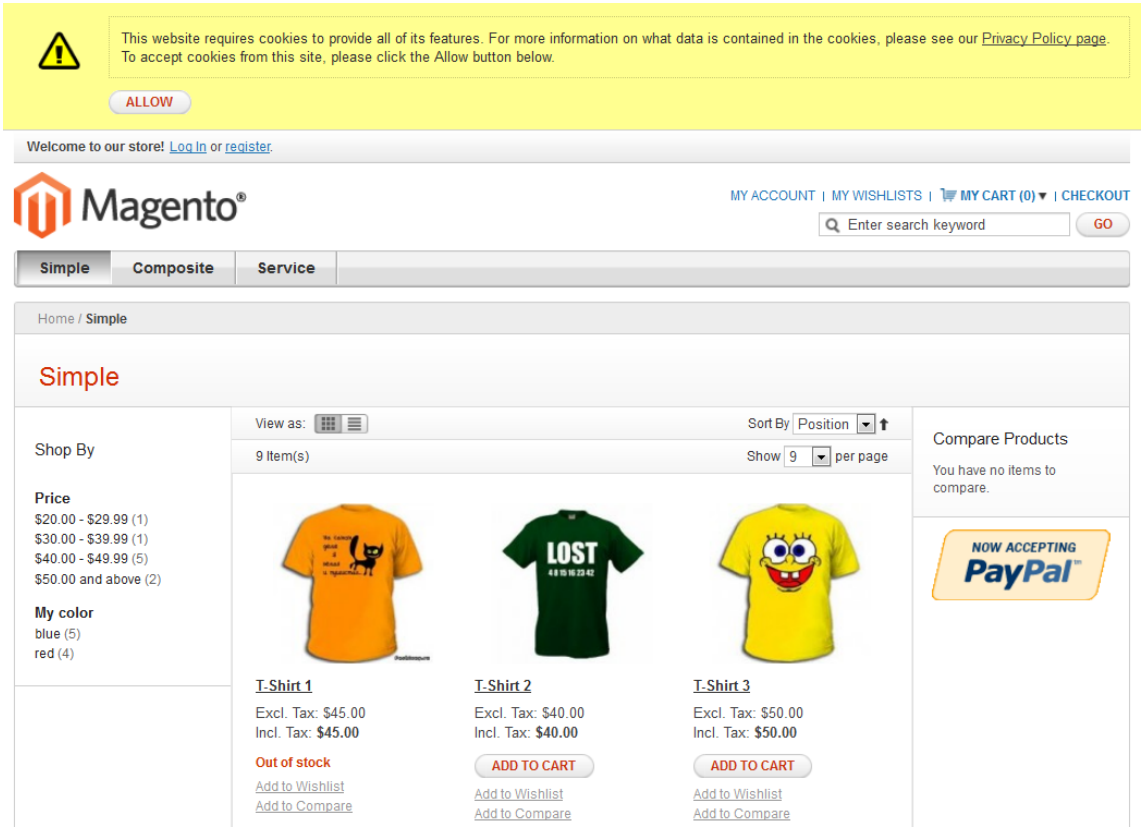



Figure 25. A warning message is displayed in the frontend when the cookie restriction mode is enabled

The message contains a link to the Privacy Policy page, which provides a list of cookies being collected and explains on how they are used. The default content of this page can be changed under **CMS** > **Pages** > **Manage Content** > *Privacy Policy.*

After a customer clicks **Allow**, the message disappears.

If a customer does not click **Allow**, the message persists, but the store functionality is available as usual. However, Google Analytics cookies are not stored in this case, even if the Google Analytics functionality is enabled.

## Cookies Used in Magento

The following table lists cookies, which are always stored by Magento on the customer's side.

| Cookie Name | Cookie Description |
|---|---|
| USER_ALLOWED_SAVE_COOKIE | Indicates whether a customer is allowed to use cookies |
| external_no_cache | A flag which indicates whether caching is disabled |
| persistent_shopping_cart | Session key |
| Stf | If links to a product were sent to friends, this cookie stores the timestamps in the '$timeStamp1, $timestamp2, ..., $timestampN' format. |
| pollN | A poll ID to indicate that the poll has been already voted. |
| frontend | Session ID |
| guest-view | Allows guests to edit their orders. |

The following table contains a list of cookies, which Magento additionally stores on customers side if the Full Page Cache functionality is enabled.

| Cookie Name | Cookie Description |
|---|---|
| CUSTOMER | Hashed value of a customer ID in the 'customer_$customerId' format |
| CUSTOMER_INFO | Hashed value of a customer group ID in the 'customer_group_$customerGroupId' format |
| NEWMESSAGE | Indicates whether a new message has been received |
| CART | Hashed value of a quote ID in the '$quoteId' format |
| COMPARE | List of product IDs added by customer to compare list in the '$productId 1, $productId 2, ..., productId N' format |
| POLL | ID of a recently voted poll |
| RECENTLYCOMPARED | A customer's list of recently compared product IDs in the '$productId 1, $productId 2, ..., productId N' format |

| Cookie Name | Cookie Description |
|---|---|
| WISHLIST | Hashed list of products added to wishlist in the '$productId 1_$productId 2_..._productId N' format |
| WISHLIST_CNT | Hashed number of items in the customer's wishlist in the 'wishlist_item_count_$productCount' format |
| CUSTOMER_AUTH | Indicates whether a customer is logged in. A hashed value of 'customer_logged_in_0\|1' |
| CATEGORY_INFO | Stores the category info on the page. This allows displaying pages more quickly. |
| LAST_CATEGORY | Recently visited category ID in the '$categoryID' format |
| VIEWED_PRODUCT_IDS | Recently viewed product IDs in '$productId 1, $productId 2, ..., productId N' format |
| currency | Code of the currency selected by a customer ('USD', 'UAH', 'GBP', etc.) |
| store | Store view code |
| NO_CACHE | Indicates whether it is allowed to use cache |
| LAST_PRODUCT | Last viewed product ID |

If the Google Analytics module is enabled and using cookies is allowed by a customer, Magento stores the following Google Analytics cookies:

- _utma
- _utmb_
- _utmc
- _utmz.

For a description of the Google Analytics cookies refer the official Google documentation.

# 4 Introducing the Frontend

In order to familiarize you with the features of the frontend, this chapter describes the basic browsing and purchasing features provided for your customers by a web store created using Magento CE. This knowledge will help you make better decisions when setting up your store.

## Overview

The frontend provides the view of your web store that is publicly available to customers using the Internet. The frontend shows your product catalog and provides your customers with ordering, payment, and tracking features.

You can access the Magento demo web stores by navigating to http://demo.magentocommerce.com. The Single Store Demo is a sample Magento store that uses Magento's default theme and sample data. This sample store is referenced throughout this user guide.

You can access your own store by browsing to the address that you defined for it during installation.

The illustration in Figure 26 shows the first page of a default Magento CE store with sample data.

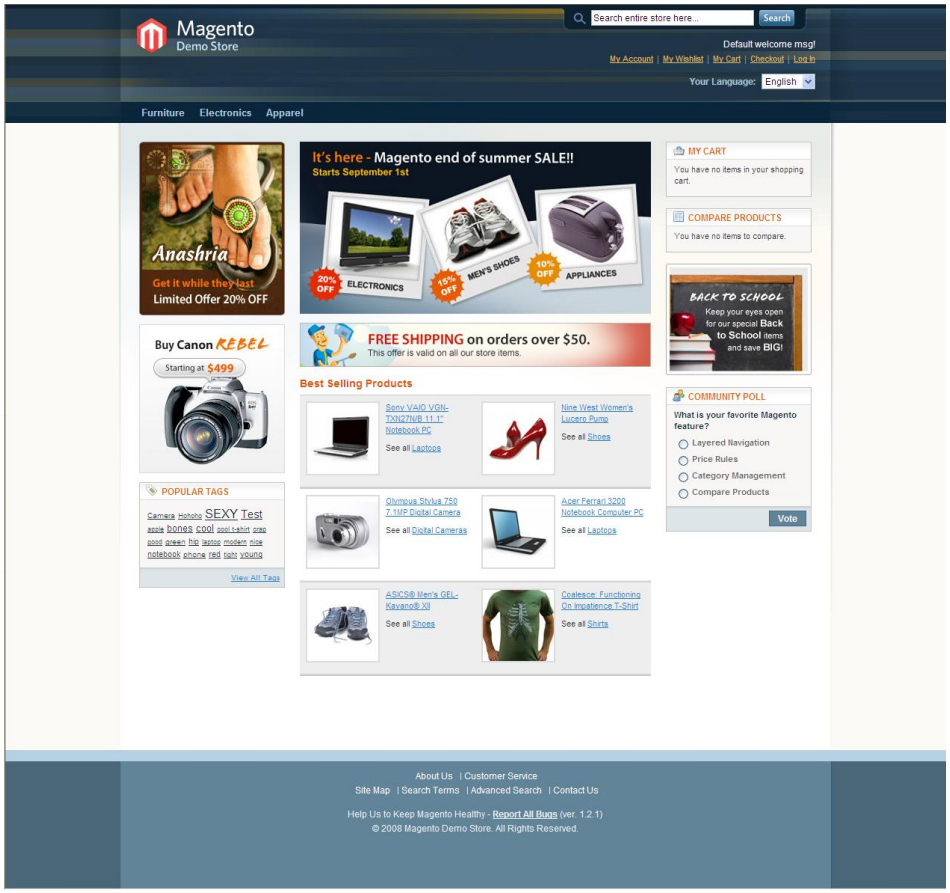

Magento
Demo Store
Search entire store here...
Search
Default welcome msg!
My Account | My Wishlist | My Cart | Checkout | Log In
Your Language: English
Furniture
Electronics
Apparel
Anashria
Get it while they last
Limited Offer 20% OFF
It's here - Magento end of summer SALE!!
Starts September 1st
20% OFF
ELECTRONICS
15% OFF
MEN'S SHOES
10% OFF
APPLIANCES
MY CART
You have no items in your shopping cart.
COMPARE PRODUCTS
You have no items to compare.
BACK TO SCHOOL
Keep your eyes open for our special Back to School items and save BIG!
Buy Canon REBEL
Starting at $499
FREE SHIPPING on orders over $50.
This offer is valid on all our store items.
Best Selling Products
Sony VAIO VGN-TXN27N/B 11.1" Notebook PC
See all Laptops
Nine West Women's Lucero Pump
See all Shoes
Olympus Stylus 750 7.1MP Digital Camera
See all Digital Cameras
Acer Ferrari 3200 Notebook Computer PC
See all Laptops
ASICS® Men's GEL-Kayano® XII
See all Shoes
Coalesce: Functioning On Impatience T-Shirt
See all Shirts
COMMUNITY POLL
What is your favorite Magento feature?
Layered Navigation
Price Rules
Category Management
Compare Products
Vote
POPULAR TAGS
Camera Hohoho SEXY Test apple bones cool cool t-shirt crap good green hip laptop modern nice notebook phone red tshirt young
View All Tags
About Us | Customer Service
Site Map | Search Terms | Advanced Search | Contact Us
Help Us to Keep Magento Healthy - Report All Bugs (ver. 1.2.1)
© 2008 Magento Demo Store. All Rights Reserved.

Figure 26. Magento CE Store Frontend

# Finding the Right Products

The Magento CE frontend is also referred to in this guide as your *web store*. It provides a variety of options for browsing through the products offered and then drilling down to view detailed information about each product. Magento CE enables you to define the default appearance of how multiple products are presented, such as whether they are shown as a list or grid (table), their sort order, and the filter that is used.

## Categories

The products in the web store are grouped into *categories*, which are displayed in a bar near the top of the web store page. Each product can be assigned to one or more categories.

Categories can have multiple levels of subcategories. A customer can navigate to a subcategory using a category's dropdown menu. Figure 27 shows the five categories on the Magento CE demo store and the subcategories under **Electronics**: **Cell Phones**, **Cameras** and **Computers**:

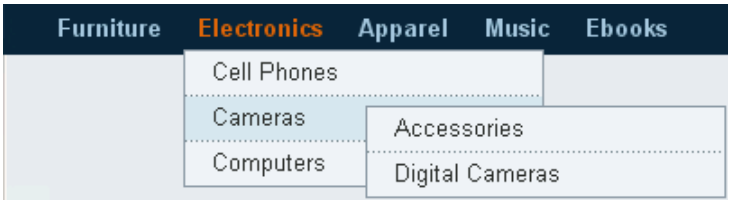



**Figure 27. Categories and Subcategories**

A category or a subcategory can each have a product list or show a landing page that features some products. Figure 28 shows a category that has products:

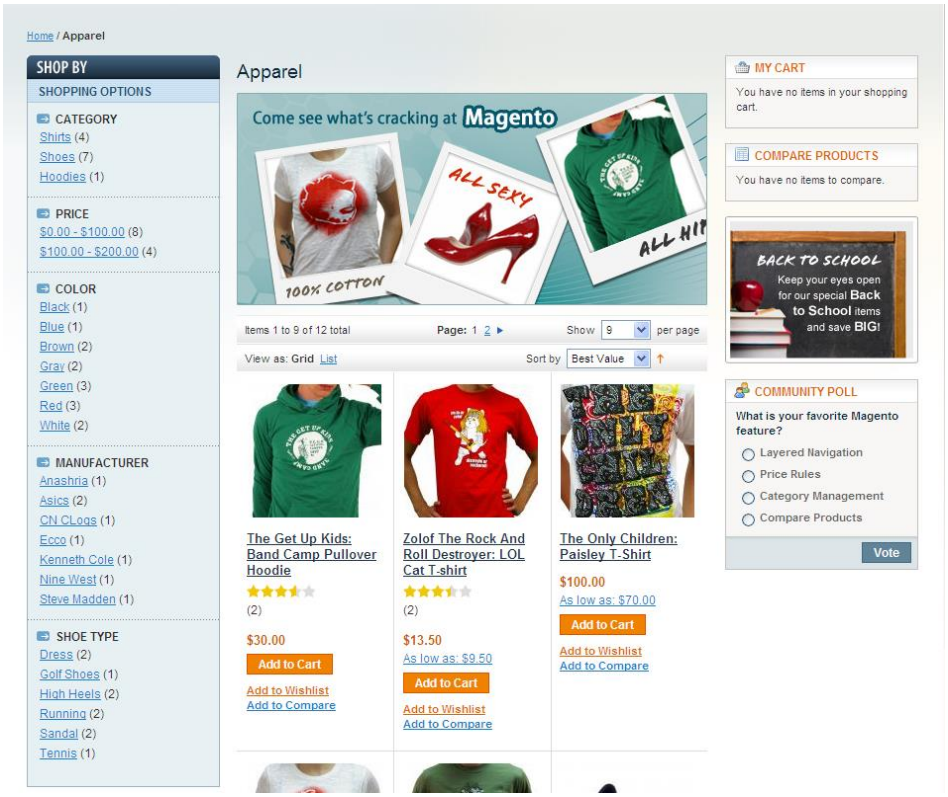



**Figure 28. Category Page with Products**

## Filtering the Display of Products

Typically, the first step of a customer when browsing through the web store may be to select the category or subcategory of the products of interest. The customer can then filter the products in that category according to the various attributes of these products.

The **SHOP BY** area on the left side of the frontend page provides a variety of product attributes that can be used to access the products in that category. The attributes in a category appear in groups, each with its own title. In the frontend page shown above, the groups that appear are **PRICE** (which shows ranges of prices), **COLOR**, **MANUFACTURER** and **SHOE TYPE**. Next to each attribute is the number of products that have that attribute.

For example: The **Apparel** category has three green products, as shown in Figure 29.

**Figure 29. Category Product Counts**

After a customer clicks on the **Green** attribute, all the green products are displayed in the web store for browsing and the **SHOP BY** area indicates that the products in this category have been filtered by the **Color: Green** attribute, as shown in Figure 30.

**Figure 30. Filter Indication**

To clear the filter and thus redisplay all the products in the currently selected category, click the **Clear** icon ( ) next to the filter, or click the **Clear All Items** option.

**Note:** The third product is shown because it contains two variants inside: a green and a red version.

## Popular Tags

Another option that Magento CE provides to help customers find the right product is called Popular Tags. Popular Tags provide another property that can be assigned to products that customers can select in order to view the products to which this tag has been assigned (see Figure 31).

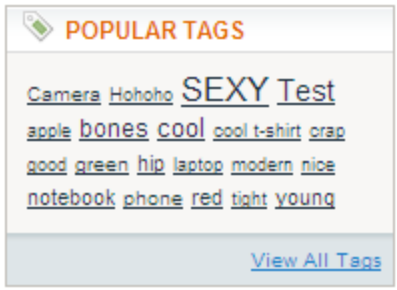

POPULAR TAGS
Camera Hohoho SEXY Test
apple bones cool cool t-shirt crap
good green hip laptop modern nice
notebook phone red tight young
View All Tags

**Figure 31. Popular Tags**

Popular tags can be assigned by customers in the product page (see Figure 32) and can be approved and edited from the backend, if required.

Product Tags
Other people marked this product with these tags:
clogs (1) | shoes (1) | tag (1) | sandals, (1) | blue, (1) | shoes, (1) | small (1) | badassness (1) | holeys (1) | blue (1) | beach (1)
Add Your Tags:
Add Tags
Use spaces to separate tags. Use single quotes (') for phrases.

**Figure 32. Adding a Tag to a Product**

## Searching

The top right of your web store page provides a search field in which a customer can type all or part of the name of a product, or its attributes, in order to find it, as shown in Figure 33.

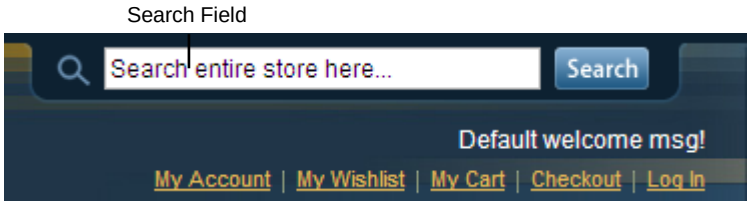



Figure 33. Search Tool

## Comparing Products

Magento CE enables customers to compare two or more selected products, as follows:

1. A customer first clicks the **Add to Compare** link provided for each product that he/she wants to compare, as shown in Figure 34.

Figure 34. Add to Compare Link

2. After selecting all the products to be compared, the customer then clicks the **Compare Items** button in the **COMPARE PRODUCTS** area, as shown in Figure 35.

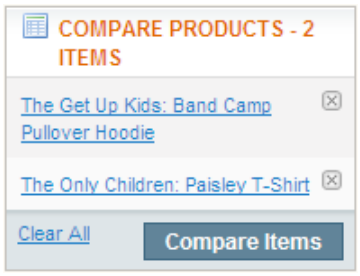

COMPARE PRODUCTS - 2 ITEMS
The Get Up Kids: Band Camp Pullover Hoodie
The Only Children: Paisley T-Shirt
Clear All
Compare Items

Figure 35. Compare Products Area

The Compare Products page is then displayed in a pop-up window, as shown in Figure 36.

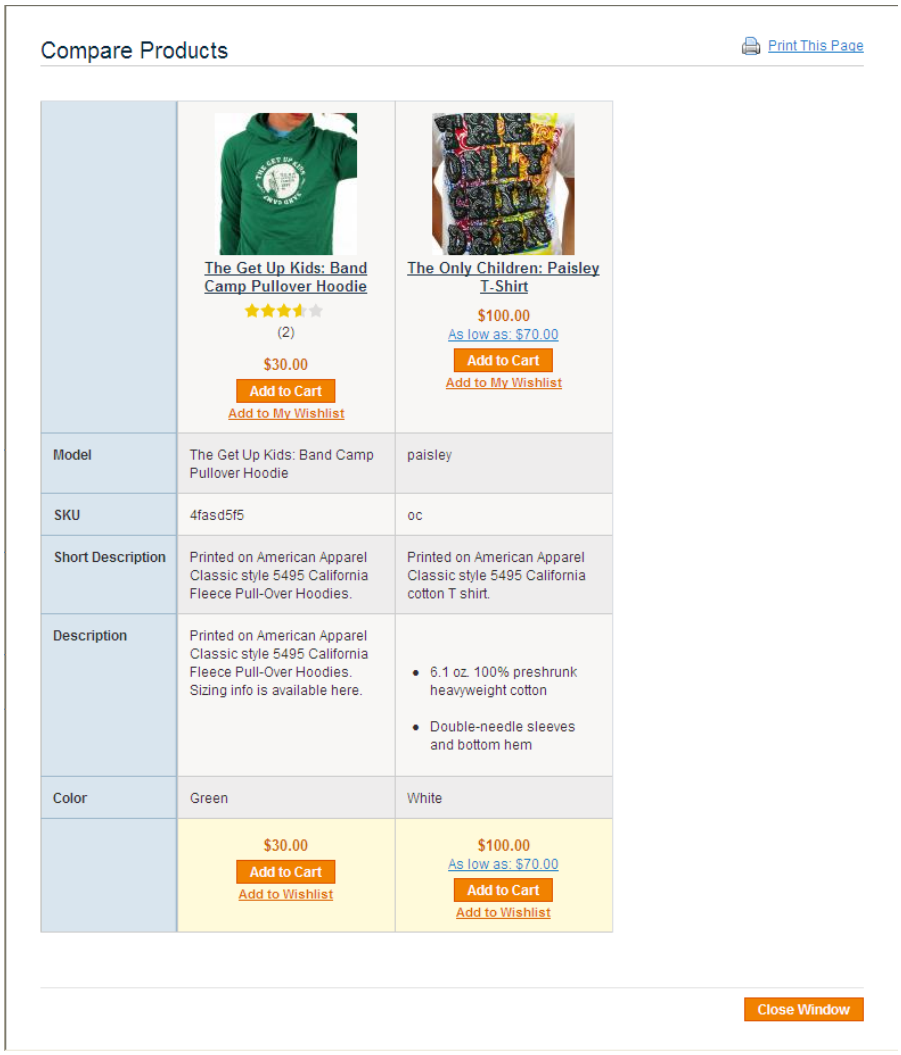



Figure 36. Compare Products Page

**Note:** A row also appears for each comparable attribute defined for these products, such as Color. See “Managing Product Attributes,” page 88, for more information about defining attributes.

## Sorting Products

A customer can sort the products that are displayed by selecting the relevant option in the **Sort by** drop-down list, as shown in Figure 37.

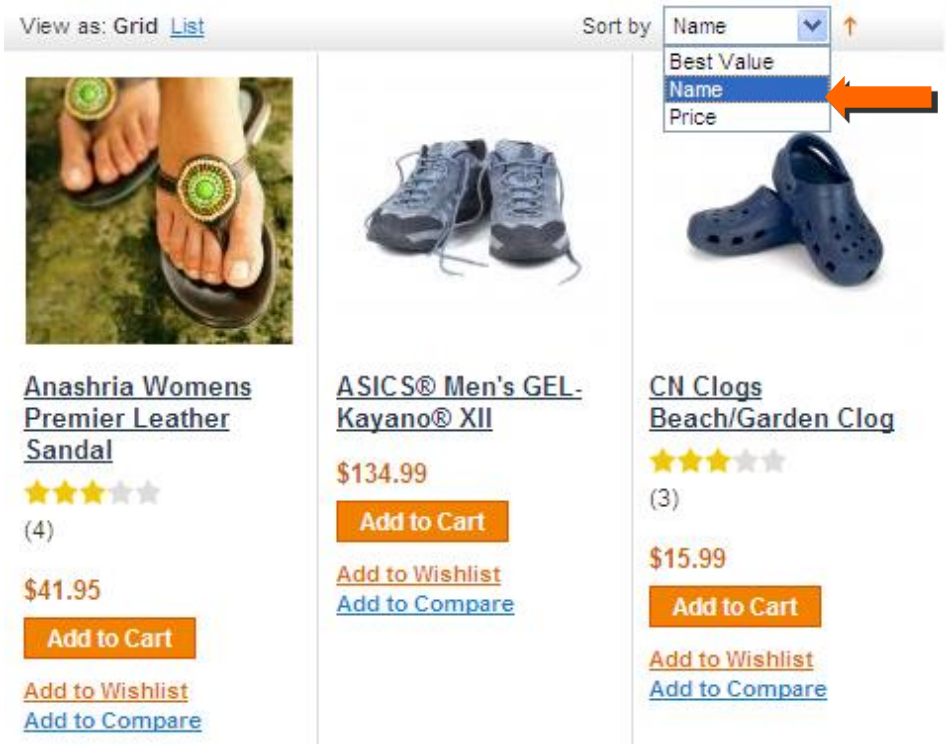



Figure 37. Sort By Drop-down list

## Grid/List View

By selecting the **Grid** or **List** links at the top of the page, a customer can choose to view products displayed in a grid (table), as shown in Figure 37, or as a list, as shown in Figure 38.

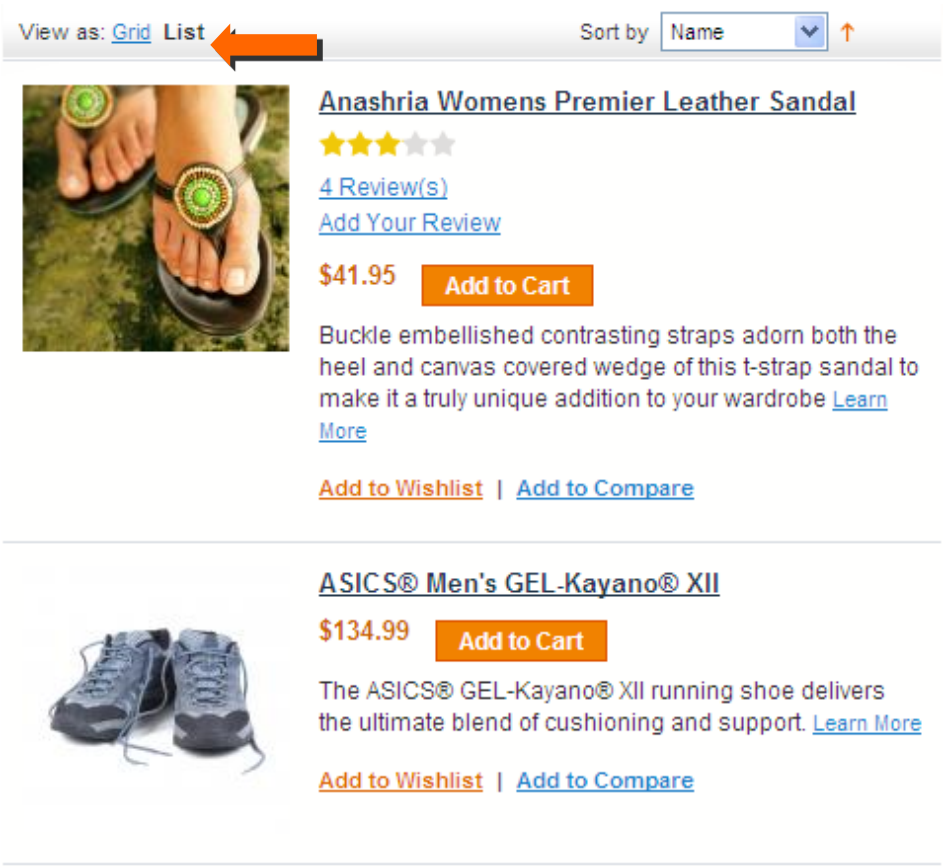

View as: Grid List
Sort by Name
Anashria Womens Premier Leather Sandal
4 Review(s)
Add Your Review
$41.95
Add to Cart
Buckle embellished contrasting straps adorn both the heel and canvas covered wedge of this t-strap sandal to make it a truly unique addition to your wardrobe Learn More
Add to Wishlist | Add to Compare
ASICS® Men's GEL-Kayano® XII
$134.99
Add to Cart
The ASICS® GEL-Kayano® XII running shoe delivers the ultimate blend of cushioning and support. Learn More
Add to Wishlist | Add to Compare

Figure 38. List View

## Recently Viewed

The **RECENTLY VIEWED PRODUCTS** area (see Figure 39) lists the products that were recently viewed by the customer, whether they were purchased or not, and enables the customer to easily link back to them.

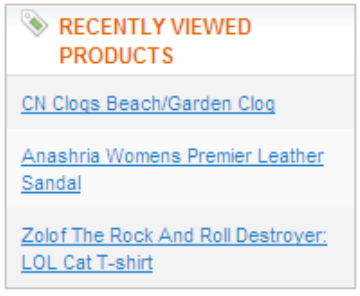

RECENTLY VIEWED PRODUCTS
CN Clogs Beach/Garden Clog
Anashria Womens Premier Leather Sandal
Zolof The Rock And Roll Destroyer: LOL Cat T-shirt

Figure 39. Recently Viewed Products Area

# Promotional Information

Magento CE provides a variety of aspects of product presentation that you can control and that enable you to promote and up-sell products to your customers.

## Product List Banners

You can define the banner that appears at the top of each category landing page with a static block (see Figure 40). This feature adds a graphical element to your category pages that can be used for special promotions, or to highlight certain products. Banners can be defined per category. More information about how to create and add static blocks on your site can be found in “Managing CMS Pages,” page 178.

Figure 40. Product List Banner

## Promotional Pages

Another way to feature products and promotions in your web store is a customized category landing page, which is a static HTML page that may be displayed while the user browsing a category, instead of showing a list of products. See Figure 41.

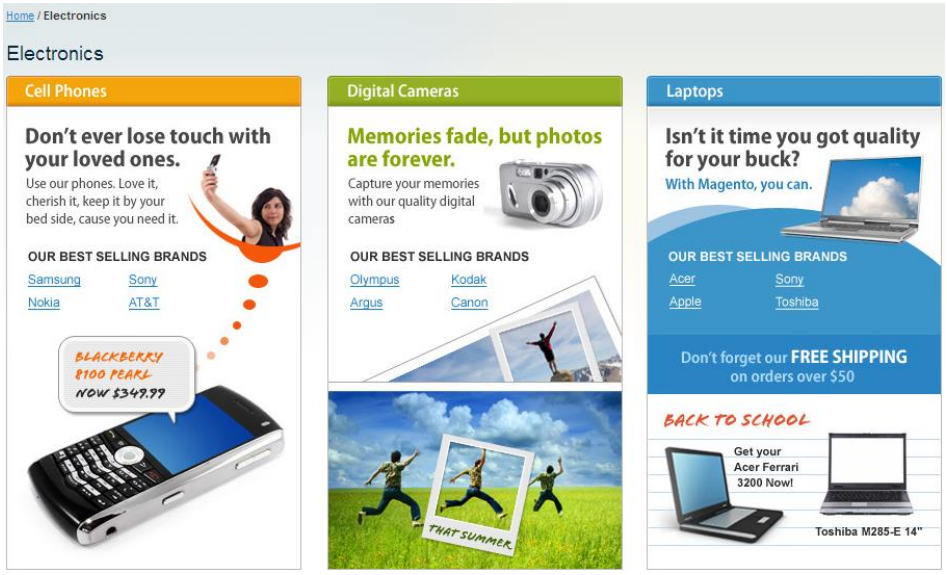



Figure 41. Promotional Page

## Up-sell Products

**Up-sell** products are items that your customer could buy *instead* of the product that is being viewed. These products may be more expensive, of higher quality, or more popular, or produce a higher profit margin.

The example in Figure 42 presents a more expensive keyboard and other products as up-sells to the less expensive keyboard.

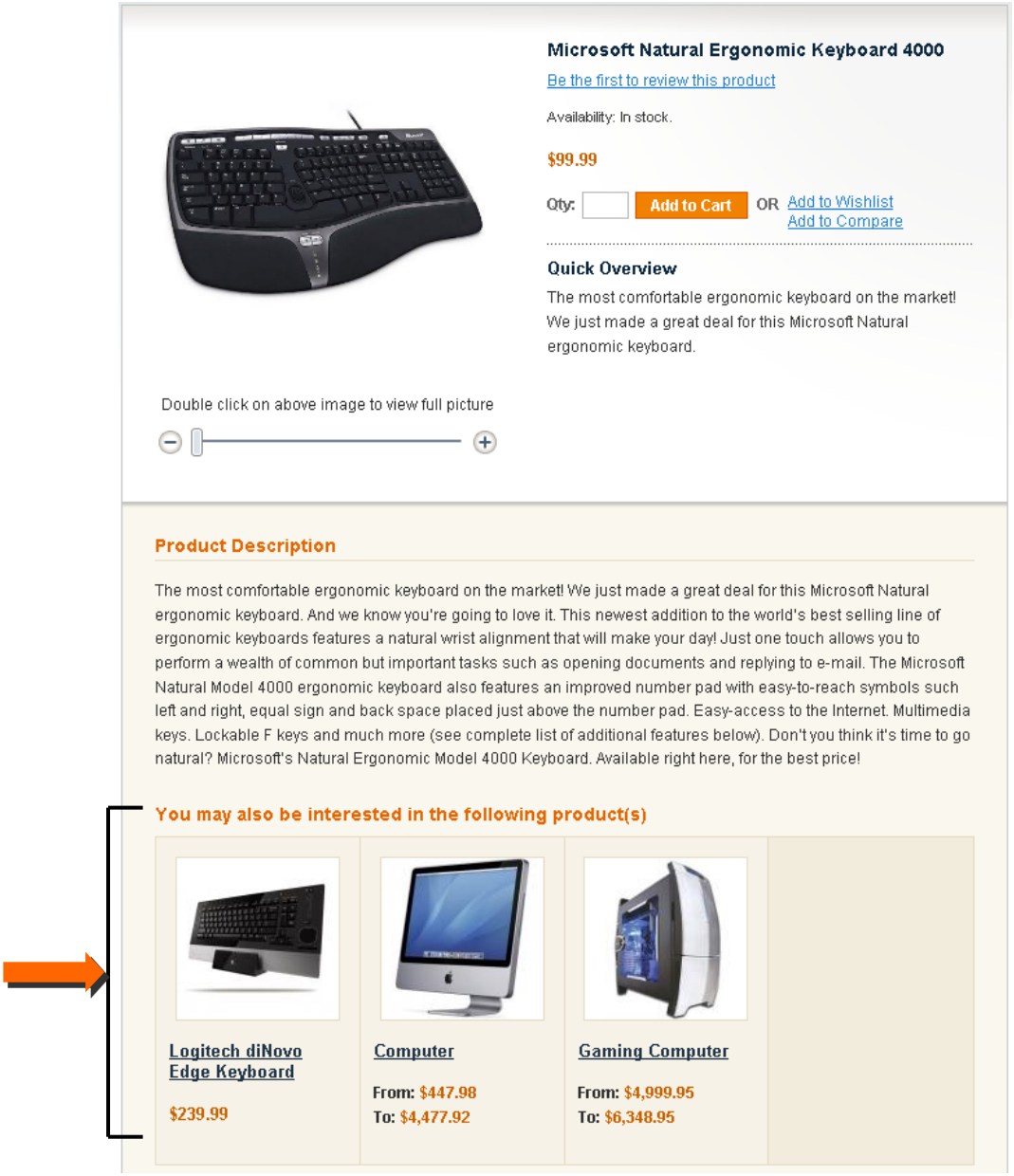

Microsoft Natural Ergonomic Keyboard 4000
Be the first to review this product
Availability: In stock.
$99.99
Qty:
Add to Cart
OR
Add to Wishlist
Add to Compare
Quick Overview
The most comfortable ergonomic keyboard on the market! We just made a great deal for this Microsoft Natural ergonomic keyboard.
Double click on above image to view full picture
Product Description
The most comfortable ergonomic keyboard on the market! We just made a great deal for this Microsoft Natural ergonomic keyboard. And we know you're going to love it. This newest addition to the world's best selling line of ergonomic keyboards features a natural wrist alignment that will make your day! Just one touch allows you to perform a wealth of common but important tasks such as opening documents and replying to e-mail. The Microsoft Natural Model 4000 ergonomic keyboard also features an improved number pad with easy-to-reach symbols such left and right, equal sign and back space placed just above the number pad. Easy-access to the Internet. Multimedia keys. Lockable F keys and much more (see complete list of additional features below). Don't you think it's time to go natural? Microsoft's Natural Ergonomic Model 4000 Keyboard. Available right here, for the best price!
You may also be interested in the following product(s)
Logitech diNovo Edge Keyboard
$239.99
Computer
From: $447.98
To: $4,477.92
Gaming Computer
From: $4,999.95
To: $6,348.95

Figure 42. Up-Sell Products

## Related Products

Related products are meant to be purchased *in addition* to the item the customer is viewing. Related products are shown in the right column of your web store in a separate block. The example in Figure 43 shows various mobile phones promoted as related products.

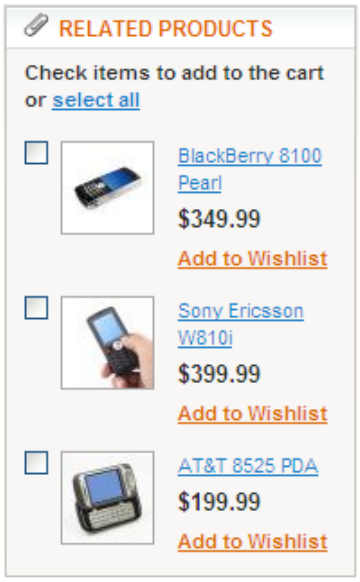



Figure 43. Related Products

## Cross-sell Products

Cross-sell products appear next to the shopping cart. When a customer navigates to the shopping cart page (whether automatically after adding a product or otherwise), these products are displayed as cross-sells to the items already in the shopping cart. They are similar to **impulse buys**, like magazines and candy at the cash registers in grocery stores. See Figure 44.

Based on your selection, you may be interested in the following items:
19" Widescreen Flat-Panel LCD Monitor
$399.99
Add to Cart
Add to Wishlist
Add to Compare

Figure 44. Cross-Sell Item

# Product Pages

The backend enables you to define the type of information and functionality that is provided in a product's page. Figure 45 shows a typical product page.

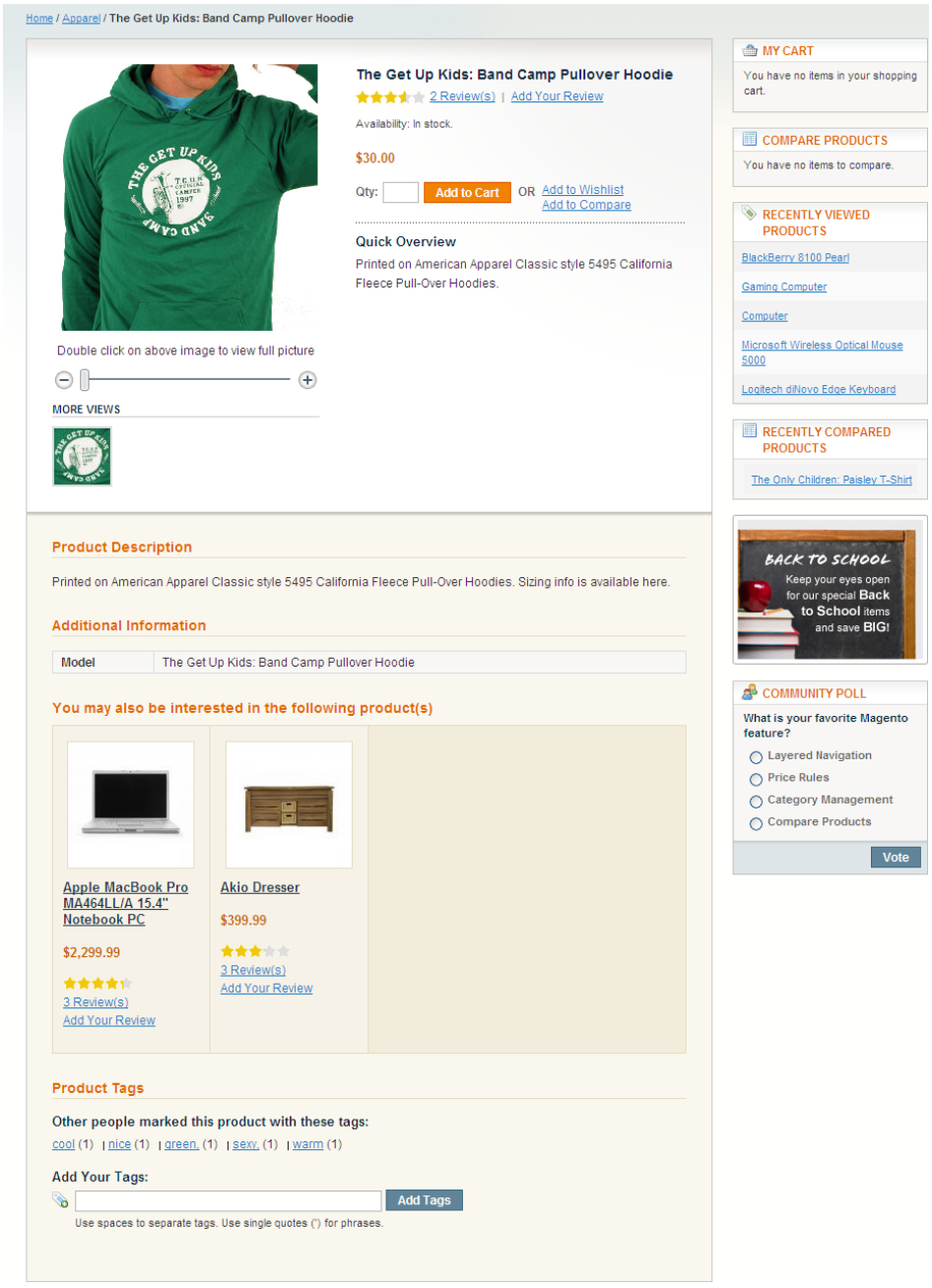

Home / Apparel / The Get Up Kids: Band Camp Pullover Hoodie
The Get Up Kids: Band Camp Pullover Hoodie
2 Review(s) | Add Your Review
Availability: In stock.
$30.00
Qty: Add to Cart OR Add to Wishlist Add to Compare
Quick Overview
Printed on American Apparel Classic style 5495 California Fleece Pull-Over Hoodies.
Double click on above image to view full picture
MORE VIEWS
MY CART
You have no items in your shopping cart.
COMPARE PRODUCTS
You have no items to compare.
RECENTLY VIEWED PRODUCTS
BlackBerry 8100 Pearl
Gaming Computer
Computer
Microsoft Wireless Optical Mouse 5000
Logitech diNovo Edge Keyboard
RECENTLY COMPARED PRODUCTS
The Only Children: Paisley T-Shirt
BACK TO SCHOOL
Keep your eyes open for our special Back to School items and save BIG!
COMMUNITY POLL
What is your favorite Magento feature?
Layered Navigation
Price Rules
Category Management
Compare Products
Vote
Product Description
Printed on American Apparel Classic style 5495 California Fleece Pull-Over Hoodies. Sizing info is available here.
Additional Information
Model
The Get Up Kids: Band Camp Pullover Hoodie
You may also be interested in the following product(s)
Apple MacBook Pro MA464LL/A 15.4" Notebook PC
$2,299.99
3 Review(s)
Add Your Review
Akio Dresser
$399.99
3 Review(s)
Add Your Review
Product Tags
Other people marked this product with these tags:
cool (1) | nice (1) | green (1) | sexy (1) | warm (1)
Add Your Tags:
Add Tags
Use spaces to separate tags. Use single quotes (') for phrases.

**Figure 45. Product Page**

Most of the features provided to present a product in your web store are self-explanatory. The following describes a few of these features:

- **Image:** The customer can use the slider to zoom in and out of the image, click on it to enlarge it, or pan it to see different parts of it.

- **Description:** The top of the page shows a short description in the **Quick Overview** area, and farther down you can see a more detailed **Product Description** area. Also, **Additional Information** details are provided about the product in the form of a table.
- **Product Tags:** Shows the tags assigned to this product. Customers can navigate to other products by clicking on one of these tags. You can also define whether customers can add tags.
- **Reviews:** Your customers can rate and review your products. The store administrator can approve or remove reviews.
- **Product Options:** Magento provides a variety of controls that enable you to configure the product options that appear for a customer to select, such as check boxes, drop-down lists, and so on. For example, customers are able to select the size of a shoe, as shown in Figure 46.

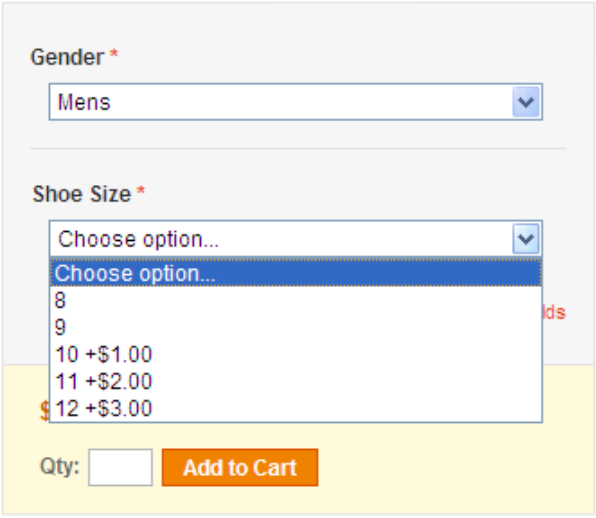



Figure 46. Product Options

# Web Store Page Header and Footer

Every web store has a header that appears at the top of each page and a footer that appears at the bottom of each page. These features enable you to control the look and feel of your web store and provide the customer with various functions, as described in this section.

## The Header

The default header of each of your web store pages shows your web store logo and banner. An example is shown in Figure 47.

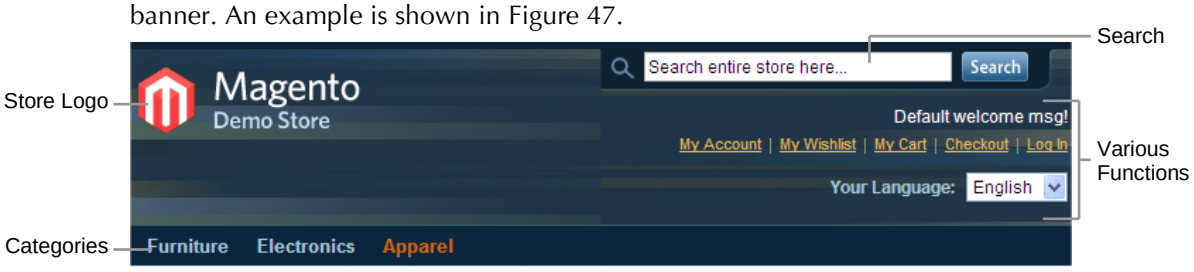



Figure 47. Web Store Header

This header also provides a variety of functions on the right, as follows:

- **My Account:** Enables registered customers to access their order history, track their shipments, download products, and change address information.
- **My Wish List:** Enables customers to define a list of items that they may want to purchase in the future. They can also share their wish list with their friends.
- **My Cart:** Enables customers to see the products that they have selected to purchase.
- **Checkout:** Enables customers to start the checkout process in order to specify payment, billing, and shipping information.
- **Log In:** Enables customers to identify themselves.
- **Log Out:** Enables customers to log out of their accounts.

## The Footer

The bottom of each of your web store pages includes a footer (see Figure 48).

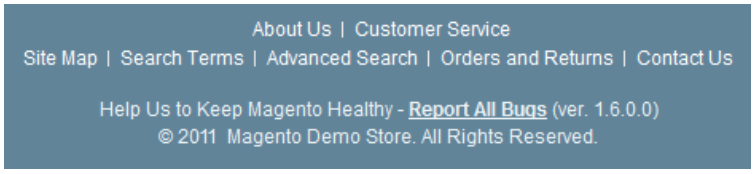

About Us | Customer Service
Site Map | Search Terms | Advanced Search | Orders and Returns | Contact Us
Help Us to Keep Magento Healthy - Report All Bugs (ver. 1.6.0.0)
© 2011 Magento Demo Store. All Rights Reserved.

Figure 48. Web Store Footer

This footer generally provides links to various informational and functional pages in the site, such as **Contact Us** and the **Site Map**.

# Purchasing Functionality

## Wishlist

The Wishlist feature enables customers to pick out products which they are interested in, but not ready to order yet. Products can be moved from the wishlist to the shopping cart with one click. Customers can also share the Wishlist their friends right from the Wishlist section of the My Account page. The Wishlist feature is available for registered customers only.

## My Cart

To add a product to your shopping cart, click on the **Add to Cart** button for that product, as shown in Figure 49.

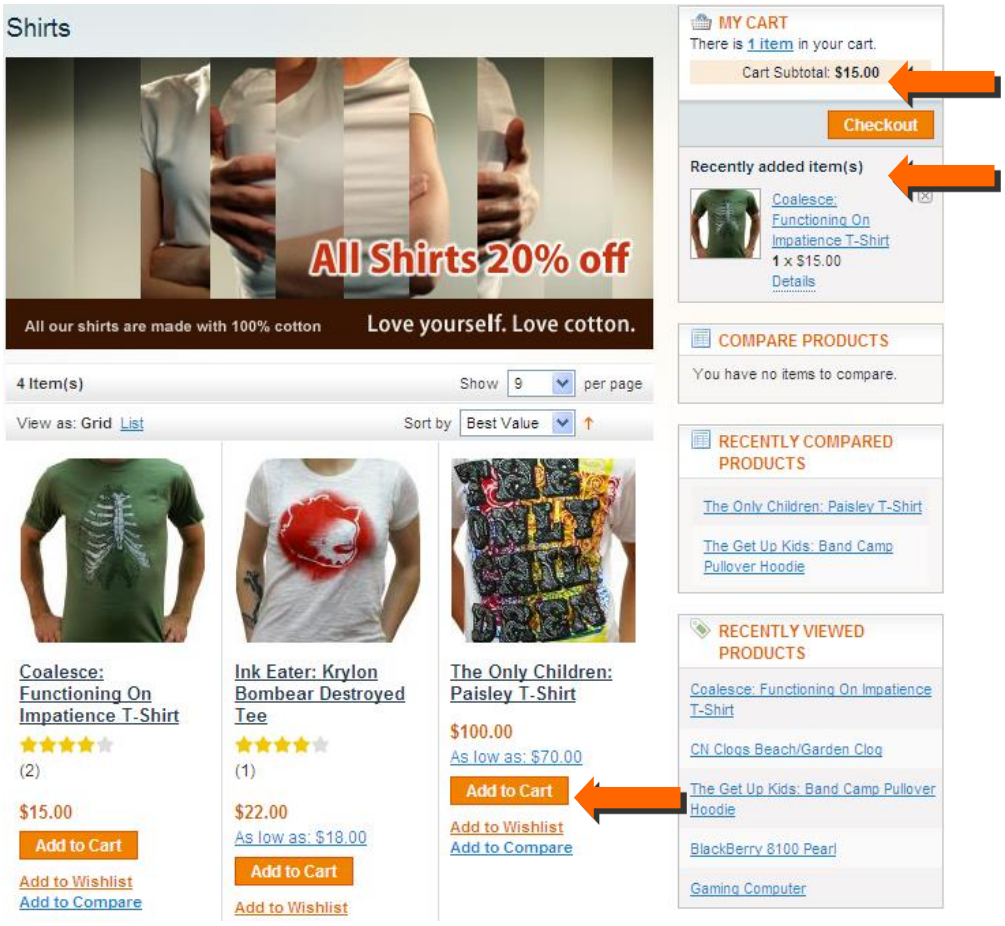



Figure 49. Add to Cart Button

The **My Cart** area shown in Figure 49 displays a brief list of the products in your shopping cart. The **Recently Added items(s)** area shows a list of the last three items added to your shopping cart.

## Clearing My Cart

A customer who wants to remove all items from the shopping cart can do so by clicking the **Clear Shipping Cart** button on the Shopping Cart page (see Figure 50).

**Figure 50. Clearing the Shopping Cart**

## Checking Out

The **My Cart** area also provides a **Checkout** button (see Figure 51) that takes a customer to the first step of the one-page checkout process (see Figure 52).

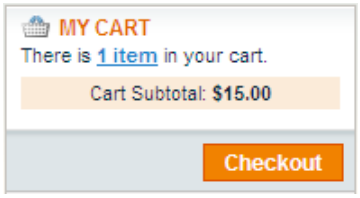



**Figure 51. My Cart Area**

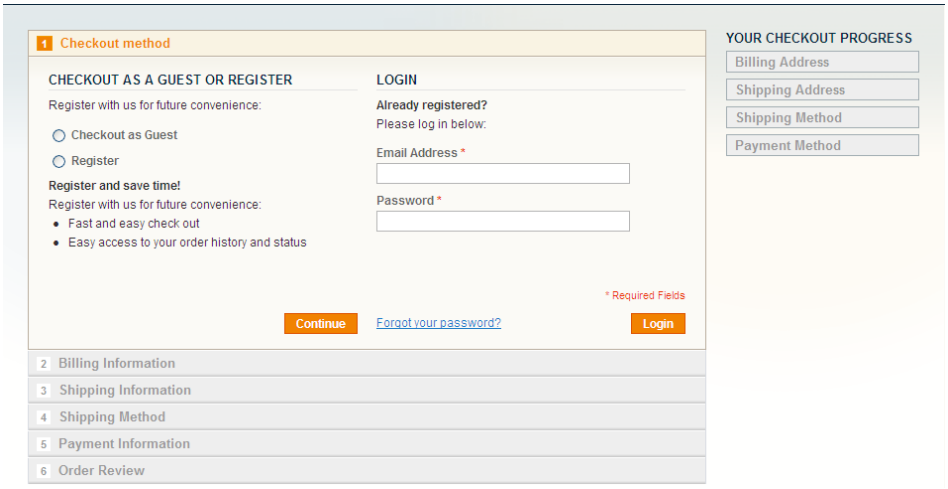



**Figure 52. Checking Out**

Most of the functionality of the checkout process is available by default. In addition, the backend provides a variety of options to customize the customer checkout process, such as various payment and shipping methods that can be offered to your customers.

A customer can make a one-time purchase as a guest or can register and create an account. Customers that have created an account can later track the status of their orders.

**Tip:** Magento CE also provides multi-shipping functionality that enables customers to ship items to more than one address at the same time. This is a very useful feature for sending gifts, for example. This feature can be configured under **System > Configuration** > SALES > **Shipping Settings > Options**.

**Tip:** Customers can also register and create an account by using the **My Account** or **Log In** link on the top right of each page.

Figure 53 shows an example of checking out as a guest by selecting the **Checkout as Guest** option in the step above

Click **Continue** to see the next step in which the customer can enter the billing and identification information.

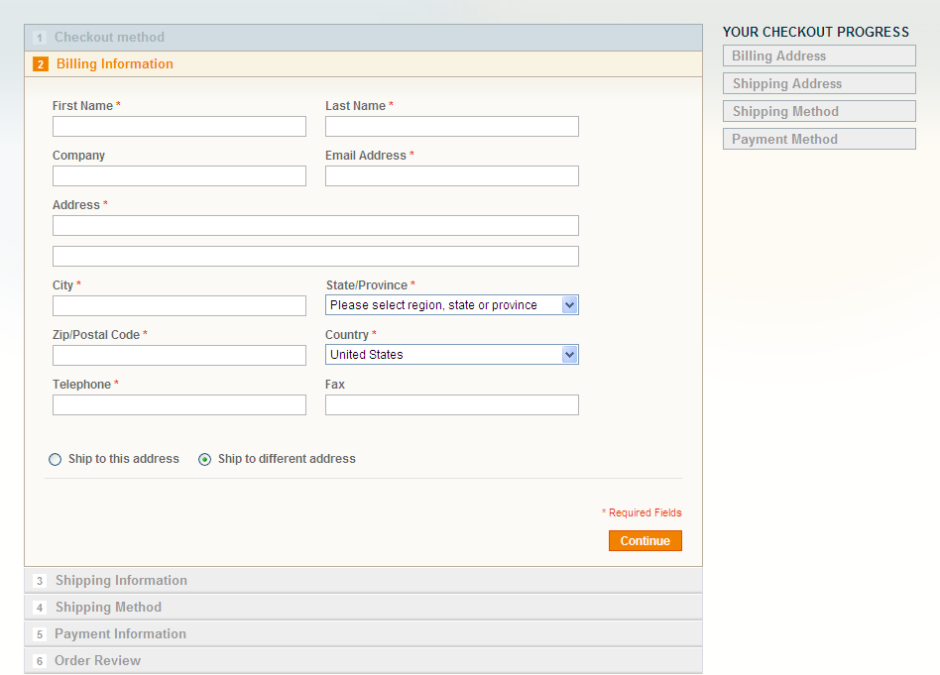



Figure 53. Checkout as Guest

Click **Continue** to specify the **Shipping Address**, select the **Shipping Method**, and select the **Payment Method**.

The last step of the checkout process enables the customer to review the entire order, as shown in Figure 54.

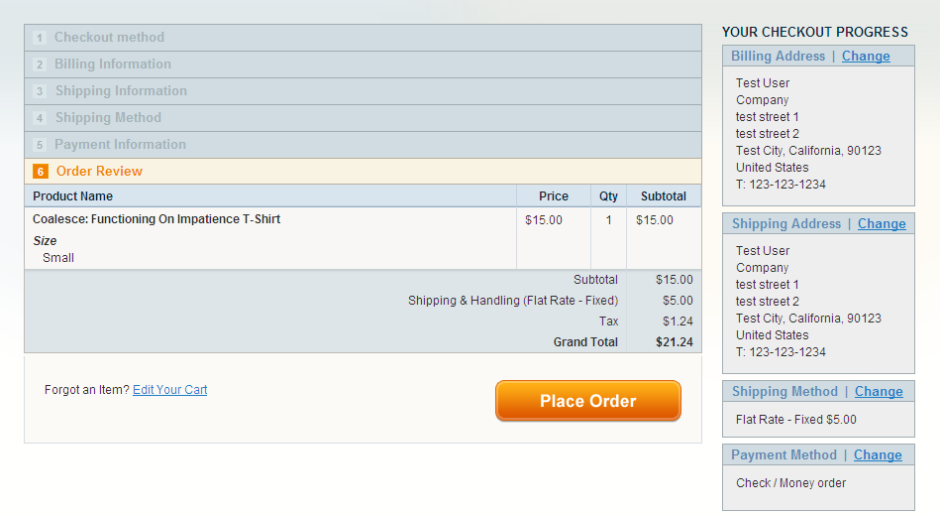



Figure 54. Order Review

**Note:** The right column shows the summary of information entered during the previous checkout steps and enables you to change any of the information that is incorrect.

Customers then confirm the order and receive an order number, or they can change their minds and edit their carts using the **Edit Your Cart** link. If they proceed with the order and the payment is processed successfully, then a "Thank You" page is displayed, as shown in Figure 55.

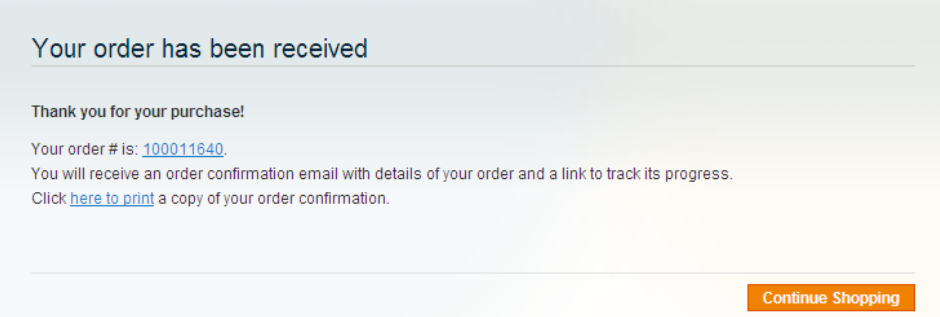
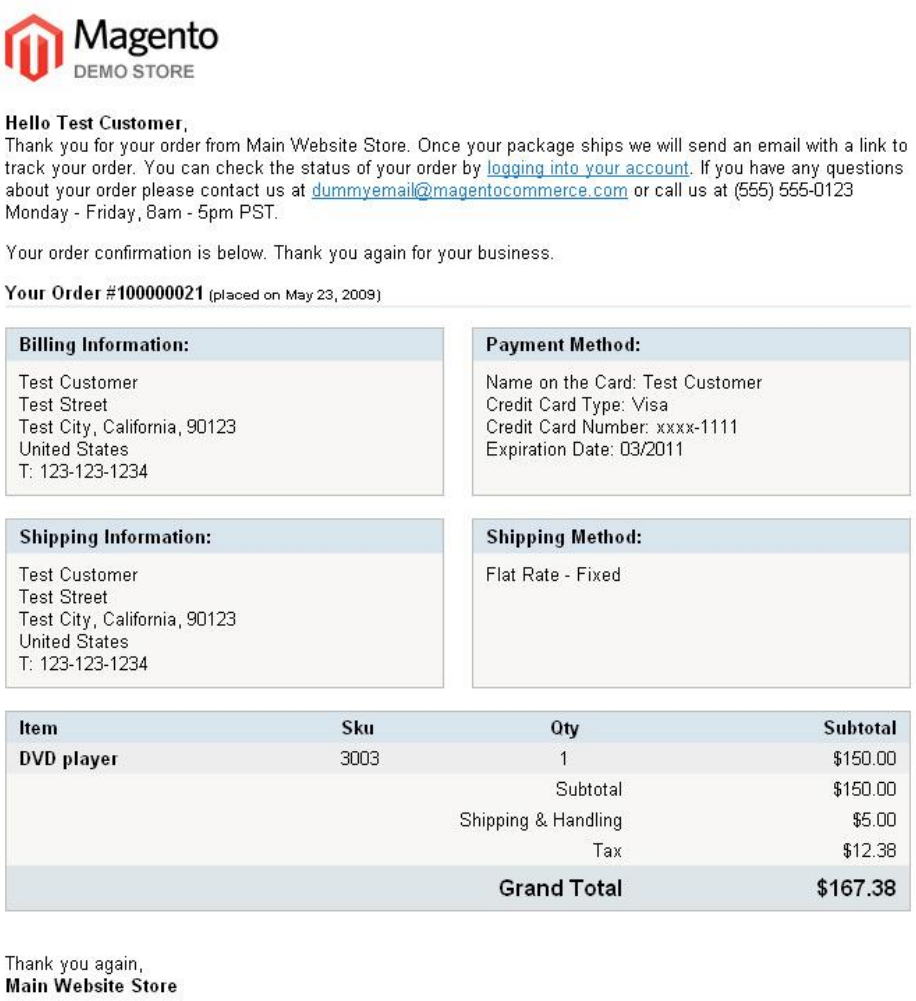

Your order has been received
Thank you for your purchase!
Your order # is: 100011640.
You will receive an order confirmation email with details of your order and a link to track its progress.
Click here to print a copy of your order confirmation.
Continue Shopping

Figure 55. "Thank You" Page

A confirmation email can be sent to the customer. An example is shown in Figure 56. The confirmation email can be configured by under **System > Configuration > Sales Emails**.



Magento
DEMO STORE

**Hello Test Customer,**
Thank you for your order from Main Website Store. Once your package ships we will send an email with a link to track your order. You can check the status of your order by logging into your account. If you have any questions about your order please contact us at dummyemail@magentocommerce.com or call us at (555) 555-0123 Monday - Friday, 8am - 5pm PST.

Your order confirmation is below. Thank you again for your business.

**Your Order #100000021** (placed on May 23, 2009)

| Billing Information: | Payment Method: |
|---|---|
| Test Customer<br>Test Street<br>Test City, California, 90123<br>United States<br>T: 123-123-1234 | Name on the Card: Test Customer<br>Credit Card Type: Visa<br>Credit Card Number: xxxx-1111<br>Expiration Date: 03/2011 |

| Shipping Information: | Shipping Method: |
|---|---|
| Test Customer<br>Test Street<br>Test City, California, 90123<br>United States<br>T: 123-123-1234 | Flat Rate - Fixed |

| Item | Sku | Qty | Subtotal |
|---|---|---|---|
| DVD player | 3003 | 1 | $150.00 |
| | | Subtotal | $150.00 |
| | | Shipping & Handling | $5.00 |
| | | Tax | $12.38 |
| | | **Grand Total** | **$167.38** |

Thank you again,
**Main Website Store**

Figure 56. Confirmation Email

# Managing Customer Relations

## Customer Emails

Magento CE can send a variety of automatically generated customer emails (such as when a customer places an order or opens an account) and enables you to customize them as you require. For more information about customizing the emails sent from the store to customers see “Customizing Transactional Emails,” page 181.

## Ratings and Reviews

Rating and review functionality is provided by Magento CE to enable customers and web store owners to give their opinions, feedback, and comments about products. They appear in the frontend, as shown in Figure 57.

Coalesce: Functioning On Impatience T-Shirt
2 Review(s) | Add Your Review
Availability: In stock.
$15.00
Add to Wishlist | Add to Compare
Quick Overview
6.1 oz. 100% preshrunk heavyweight cotton
Shoulder-to-shoulder taping
Double-needle sleeves and bottom hem
Double click on above image to view full picture

Figure 57. Ratings and Reviews

The number of stars indicates the satisfaction rating. You can click on the **Review(s)** link to display the actual textual reviews provided by customers. For more details, see "Managing Ratings and Reviews", page 231.

## Community Polls

Each web store can provide a Community Poll, as shown in Figure 58. For more details, see "Managing Polls," page 236.

Figure 58. Community Poll

# 5 Introducing the Backend

In order to familiarize you with the features of the backend, this chapter describes the ongoing management tasks that you can perform in the backend while running your Magento web store on a day-to-day basis.

See "Accessing the Backend," page 23, for details on logging in to your store's backend.

See "Setting Up Your Catalog," page 69, for a full description of how to set up your catalog. Each of the subsequent chapters features a description of the other aspects of customizing your backend.

## Understanding Scope

Magento CE enables you to organize your operations into multiple websites, stores, and store views. (See "Store Hierarchy," page 25, for descriptions of these terms.) Many of the configuration pages in the backend enable you to select the website, store, or store view that you want your configuration changes to apply to. Selecting the website, store, or store view is known as selecting the *scope* of your changes.

To select the scope for configuration changes, use the **Current Configuration Scope** drop-down list in the upper left corner of the configuration page, as shown in Figure 59.

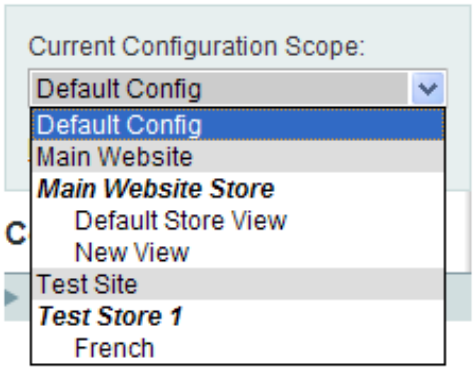



**Figure 59. Selecting Configuration Scope**

If you select **Default Config**, the option choices you make are applied as default values for all websites, stores, and store views.

On the configuration pages, you will see scope indicators to the right of each option. These indicate the lowest level of the hierarchy at which you can set the value of these options. For example, the value of the **Default Display Currency** option may be set at the default (global) level, but can be overridden at the store view level, as indicated by the "[STORE VIEW]" indicator for that option (see Figure 60).

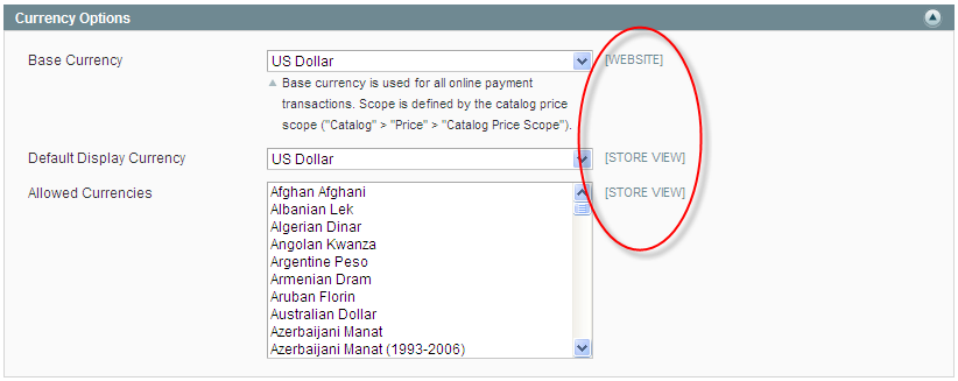



Figure 60. Scope Indicators

# Managing Administrator Messages

When you log in to the backend, any new messages are displayed in a pop-up box. Typically, these messages are notifications of new Magento CE or extension releases. You can manage these messages much like you would manage your email.

## To display all the messages in your inbox:

Click the **Go to messages inbox** on the top right of the page. The Messages Inbox page is displayed, which provides standard message handling features (see Figure 61).

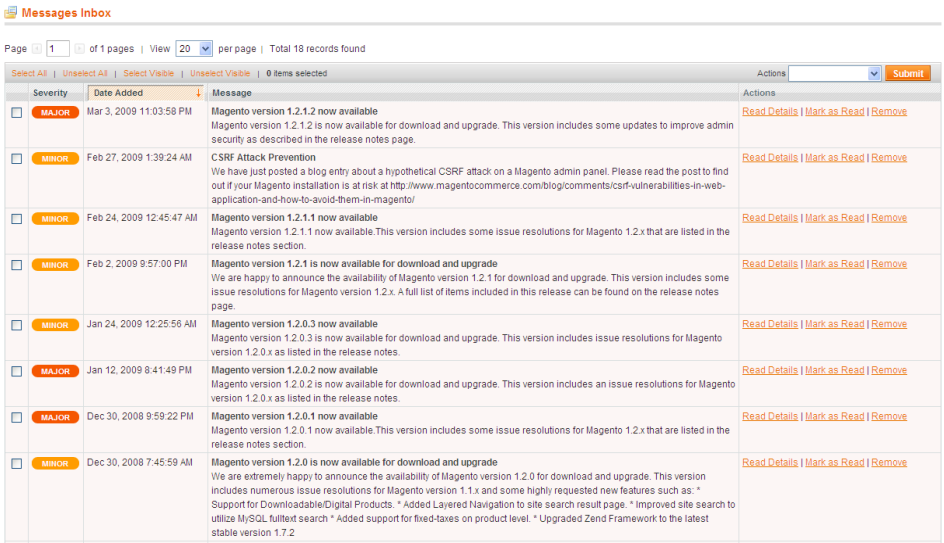

Messages Inbox
Page 1 of 1 pages | View 20 per page | Total 18 records found
Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected
Actions Submit
Severity
Date Added
Message
Actions
MAJOR Mar 3, 2009 11:03:58 PM Magento version 1.2.1.2 now available Magento version 1.2.1.2 is now available for download and upgrade. This version includes some updates to improve admin security as described in the release notes page. Read Details | Mark as Read | Remove
MINOR Feb 27, 2009 1:39:24 AM CSRF Attack Prevention We have just posted a blog entry about a hypothetical CSRF attack on a Magento admin panel. Please read the post to find out if your Magento installation is at risk at http://www.magentocommerce.com/blog/comments/csrf-vulnerabilities-in-web-application-and-how-to-avoid-them-in-magento/ Read Details | Mark as Read | Remove
MINOR Feb 24, 2009 12:45:47 AM Magento version 1.2.1.1 now available Magento version 1.2.1.1 now available.This version includes some issue resolutions for Magento 1.2.x that are listed in the release notes section. Read Details | Mark as Read | Remove
MINOR Feb 2, 2009 9:57:00 PM Magento version 1.2.1 is now available for download and upgrade We are happy to announce the availability of Magento version 1.2.1 for download and upgrade. This version includes some issue resolutions for Magento version 1.2.x. A full list of items included in this release can be found on the release notes page. Read Details | Mark as Read | Remove
MINOR Jan 24, 2009 12:25:56 AM Magento version 1.2.0.3 now available Magento version 1.2.0.3 is now available for download and upgrade. This version includes issue resolutions for Magento version 1.2.0.x as listed in the release notes. Read Details | Mark as Read | Remove
MAJOR Jan 12, 2009 8:41:49 PM Magento version 1.2.0.2 now available Magento version 1.2.0.2 is now available for download and upgrade. This version includes an issue resolutions for Magento version 1.2.0.x as listed in the release notes. Read Details | Mark as Read | Remove
MAJOR Dec 30, 2008 9:59:22 PM Magento version 1.2.0.1 now available Magento version 1.2.0.1 now available.This version includes some issue resolutions for Magento 1.2.x that are listed in the release notes section. Read Details | Mark as Read | Remove
MINOR Dec 30, 2008 7:45:59 AM Magento version 1.2.0 is now available for download and upgrade We are extremely happy to announce the availability of Magento version 1.2.0 for download and upgrade. This version includes numerous issue resolutions for Magento version 1.1.x and some highly requested new features such as: * Support for Downloadable/Digital Products. * Added Layered Navigation to site search result page. * Improved site search to utilize MySQL fulltext search * Added support for fixed-taxes on product level. * Upgraded Zend Framework to the latest stable version 1.7.2 Read Details | Mark as Read | Remove

Figure 61. Messages Inbox Page

You can mark selected messages as **Read** so that they do not appear again when you log in. You can also **Remove** marked messages so that they are permanently deleted.

# Supervising Web Store Activities

The Dashboard (Figure 62) is the first page to be displayed by default after you log in. It can also be accessed by clicking **Dashboard** on the Admin Panel top menu.

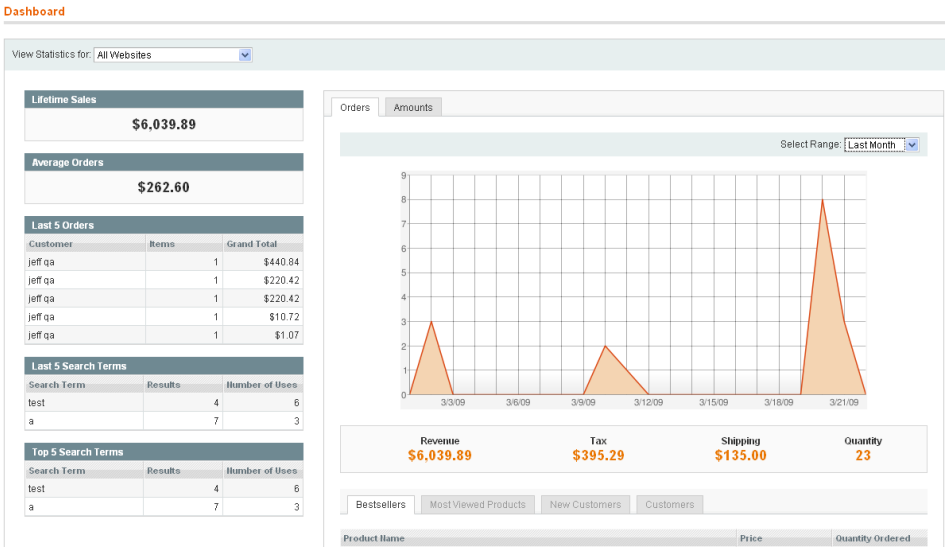



**Figure 62. Dashboard**

This page shows you basic information and statistics for managing your web store. The following describes the options in this page:

## Chart

**Orders tab:** The **Orders** tab in the center of the page shows a graph that indicates the quantity of orders being processed in your web store for each point on the time scale within the specified range. The range is selected in the **Select Range** drop-down list at the top of the chart. Underneath you can see the revenue, tax and shipping amounts of your orders and the total quantity of the orders. Only orders for which at least one invoice, shipment, or credit memo has been created or which have been created from external gateways (for example, PayPal Express) are included in the reports.

**Amounts tab:** The **Amounts** tab in the center of the page shows a graph indicating the revenue for each point on the time scale within the specified range. The range is selected in the **Select Range** drop-down list at the top of the chart.

**Revenue, Tax, Shipping, and Quantity:** These statistics are calculated as follows:

- Revenue = Total Invoiced Amount - Tax Invoiced Amount - Shipping Invoiced Amount - (Total Refunded Amount - Tax Refunded Amount - Shipping Refunded Amount)
- Tax = Tax Invoiced Amount - Tax Refunded Amount
- Shipping = Shipping Invoiced Amount - Shipping Refunded Amount

**Note**: Charts can be enabled or disabled under **System > Configuration > ADVANCED > Admin > Dashboard.**

## Left Information Panel

The panel on the left shows you the total amount of orders handled in your Magento CE web store, the average amount of each order, information about your last five orders, and the last five and top five search terms.

## Bottom Information Tabs

The bottom of the Dashboard (Figure 63) provides additional information about your web store, as follows:

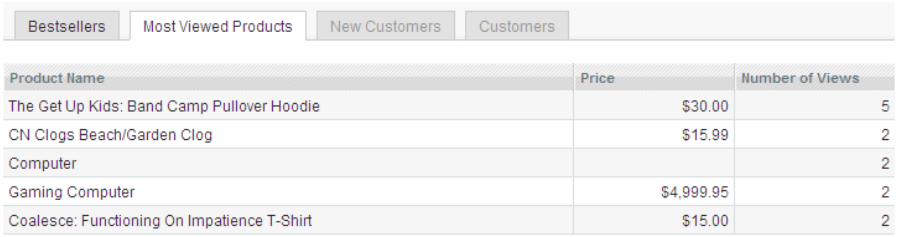



**Figure 63. Additional Dashboard Information**

- **Bestsellers Tab:** Shows a list of the best-selling products in your web store, their price, and the quantity ordered.
- **Most Viewed Products Tab:** Shows a list of the most recently viewed products and the number of times they were viewed.
- **New Customers:** Shows a list of the most recently registered customers.
- **Customers:** Shows a list of your top customers, meaning the customers that have ordered the most items from your web store in the last year.

# Managing Orders

This section first describes how to view and manage orders, as well as how to create orders from the backend.

# Viewing the Orders in Your Web Store

## To view the orders in your web store:

In the Admin Panel, select **Sales > Orders** to display the Orders page, as shown in Figure 64.

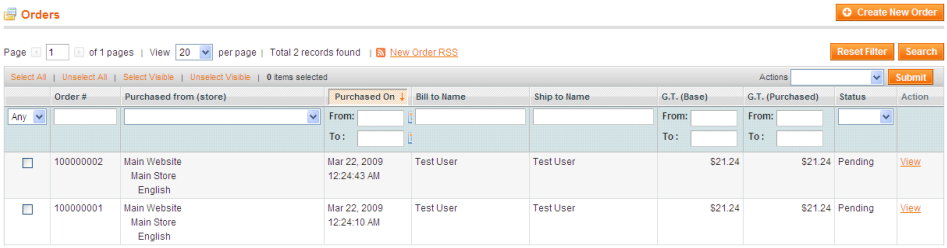



**Figure 64. Orders Page**

This page displays a list of the orders placed in your web store.

The following describes some of the options for managing orders in this page:

- **Quantity of Orders Displayed:** The top part of the page enables you to control how many orders are displayed in the page, as shown in Figure 65.

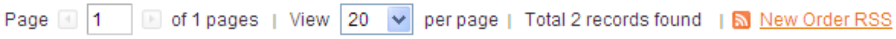



**Figure 65. Order Display Controls**

- **Selecting Orders:** The area under the order display controls enables you to select/unselect all the orders in your web store or to select/unselect all the orders currently visible, meaning those that are currently displayed in this page.

**Figure 66. Order Selection Controls**

**Note:** You can also select individual orders by selecting the check box on the left of each order.

- **Filtering Orders:** The area under the order selection controls enables you to filter the orders that are displayed by specifying values in one or more of the fields and then clicking **Search**. To display all orders, click **Reset Filter**.

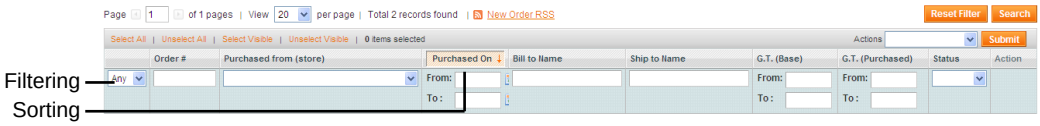
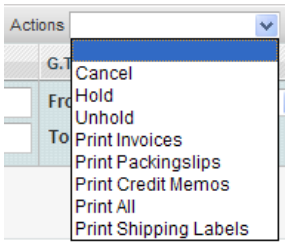



**Figure 67. Filtering Controls**

**Note:** The list displays only those orders that meet all the criteria that you specified.

- **Sorting orders:** Click on the header of a column to sort the orders by the value of that column. Each click toggles between an ascending sort and a descending sort.
- **Order actions:** The **Actions** drop-down list provides a list of actions that may be performed on the selected orders. The actions that can be performed include the following:




  - **Cancel:** Sets the order status to **Canceled** and disables any further processing.
  - **Hold:** Puts the order on hold. The order is not affected in any way, but no further action may be performed unless you release it from Hold status.
  - **Unhold**: Releases the order from Hold status.
  - **Printing options**: These options enable you to print various documents related to the order.
- **Viewing an order:** To view and/or edit an existing order, click row for the desired order or click the **View** option in the order's row in the **Action** column. The Order View page opens, showing details about the order.

## Viewing an Order's Details

Magento CE provides a large variety of information for each order. This section provides a quick review of some of the information provided for an existing order. The navigation bar at the top of the Order View page enables you to access the various sections: **Information**, **Invoices**, **Credit Memos**, **Shipments**, **Comments History,** and **Transactions**.

### Information Page

This page provides an overview of the most important information about the order, such as the current status of the order, the products ordered, customer information, billing, shipping, and payment information.

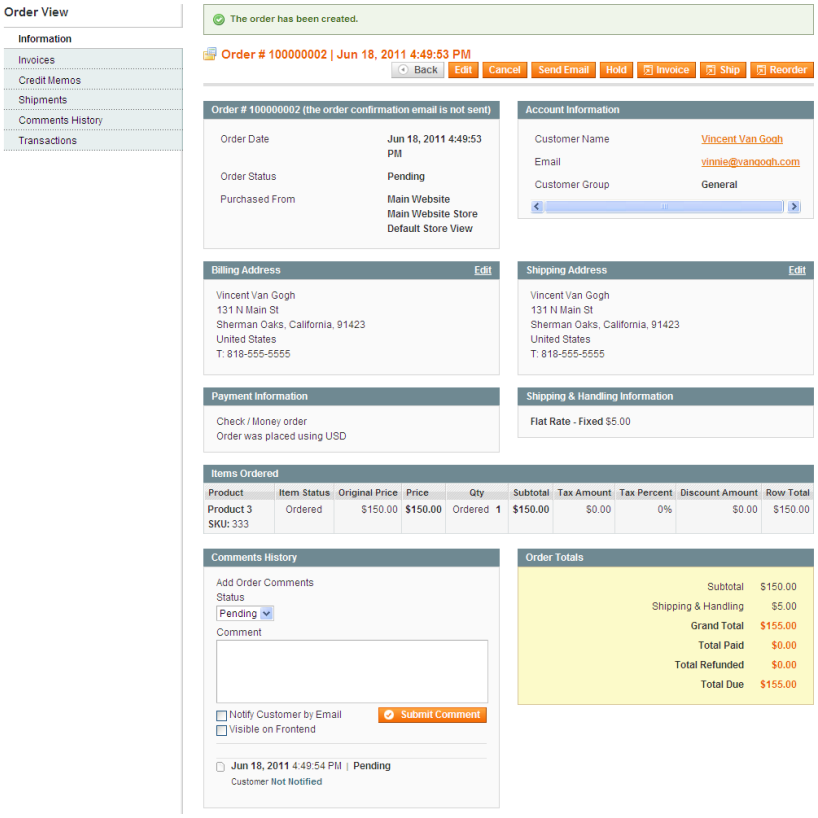



Figure 68. Order Information Page

**Note:** The SKU (Stock Keeping Unit) specifies the product code that is used to keep track of the actual inventory. SKUs are defined during product creation. For details about managing your product catalog, see "Setting Up Your Catalog," page 69.

The **Comments History** area of this page provides information about the lifecycle of the order. Every time that an invoice, shipment, or credit memo document is created, a record with each document's identification is added on this tab. Also, here you can find out whether the customer was notified about the creation of each order document. For each partial refund, the system provides the order amount to be returned to the customer. You can change order status in the **Status** drop-down list.

## To add a comment to the order:

1. Specify the comment text in the **Comment** text box.
2. If you want to send the comment to the customer by email, select the **Notify Customer by Email** check box.
3. If you want to make the comment visible in the order view on the frontend, select the **Visible on Frontend** check-box to specify that the customer is sent a copy of the comments that you add in the Comment box.
4. Click **Submit Comment**.

All comments are stored on the Comments History page. To open it, click the Comments History tab on the left.

### Invoices Page

An invoice represents a confirmation of payment. The Invoices page enables you to view the list of invoices generated for an order.

You can generate an invoice individually or together with a shipment. If the products in an order are shipped in multiple shipments, then an invoice is generated for each shipment for the products in that shipment.

### Credit Memos

The Credit Memos page displays a list of the refunds given for products in this order. You can click on a credit memo in the list to display the refund details.

### Shipments Page

A shipment is a record of the products in an order that have been shipped. As with invoices, multiple shipments can be created per order.

The Shipment page displays a list of the shipments sent for products in this order. You can click on a shipment in the list to display the shipment details.

On the Shipment page, you can also add tracking numbers that were received from shipping service providers. The tracking number enables customers to learn the status of the shipments in their orders using the My Account option that appears in the header of the frontend. For the supported shipping service providers you can create and print shipping labels form the Shipment page.

## Comment History Page

The Comment History page enables you to view a list of comments that have been added to the order record over the course of its life cycle. It is a good practice to add comments at every stage of the order, especially if problems come up.

## Transactions Page

The Transactions page enables you to view a list of transactions that are associated with this order.

## Creating New Orders

You may want to create an order using the backend, for example when an order is received over the phone.

**Tip:** Typically, orders are placed by customers in the frontend. In addition, you can create orders in the backend. This enables you to take orders by phone, mail or fax and then enter them into your web store to be managed and tracked. This feature is useful for call center operators to take orders directly from your customers. The ordering process in the backend is not much different from the one your customers experience. The backend provides all the same functions that your customers have when creating an order from your web store, including the ability to move products between the shopping cart and wishlist. It also enables you to give customers special prices and discounts.

### To create a new order from the backend:

1. Select **Sales > Orders**.
2. Click the **Create New Order** button on the top right.

A full description of this procedure is provided in "Managing Orders," page 223.

## Managing Ratings and Reviews

Rating and review functionality is provided by Magento CE to enable customers and web store owners to submit their opinions, feedback, and comments about products. Product reviews and ratings can also be added using the backend. To access the ratings and reviews management features, select **Catalog > Reviews and Ratings**.

For more information about ratings and reviews, see "Managing Customer-Generated Content," page 231.

## Generating Reports

Magento CE provides a variety of reports that you can access at any time. These reports are available under the **Reports** menu at the top of the Admin Panel.

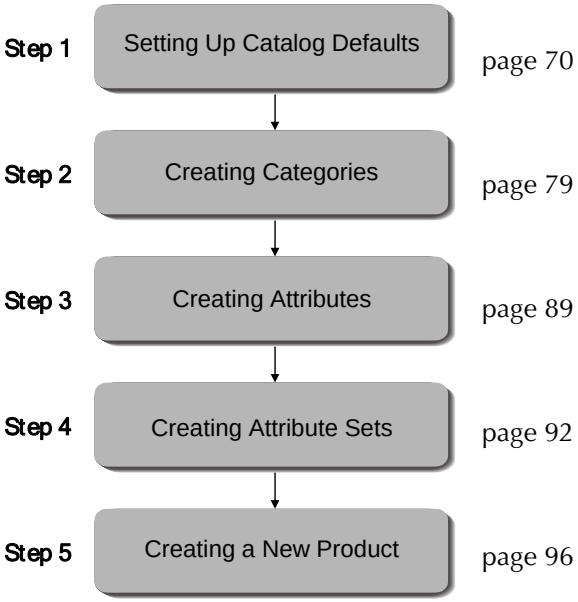
Some of the most important reports are described in "Reports," page 239.

# 6 Setting Up Your Catalog

This chapter describes how to create a catalog for your Magento CE web store, how to add products, and how to define their attributes.

## Overview

The best workflow for creating your products is as follows:




The following describes the process depicted above:

- **Step 1:** "Setting Up Catalog Defaults," page 70. This step describes how to set basic catalog default configurations that define its behavior.
- **Step 2:** "Creating Categories," page 79. The next step is to create the categories that will contain your products. Each product can be assigned to one or more categories.

  A Magento CE store with Sample Data provides three such categories: **Furniture**, **Electronics**, and **Apparel**. Categories can have multiple levels of subcategories. A customer can click on a category to see a drop-down list of subcategories, such as **Cell Phones**, **Cameras**, and **Computers**, as shown in Figure 69.

Figure 69. Categories and Subcategories

- **Step 3: Creating Attributes,** page 89. Next, you can create the attributes that represent a product's characteristics. Attributes are a powerful Magento CE concept to make finding and comparing products easier.
- **Step 4: Creating Attribute Sets,** page 92. Attribute sets are logical groups of attributes that simplify the process of assigning attributes to a product. They do not appear in the front-end user interface.
  - **Creating a New Attribute Group,** page 94. Part of the process of creating an attribute set is to create attribute groups. These groups determine how attributes appear in the backend when defining a product.
- **Step 5: Creating a New Product,** page 96. This step shows how to fill in product information in order to maximize conversion and how to assign Categories to help customers navigate to the products of interest to them. Attribute sets and attributes are assigned to products to describe them, provide multiple options and help the customer search through the product list.

# Setting Up Catalog Defaults

The first step to creating your catalog is to configure the catalog system default settings. In many cases, these settings can be overridden at lower levels (such as in individual categories and products).

### To configure catalog defaults:

In the Admin Panel, select **System > Configuration >** CATALOG **> Catalog**. In the **Current Configuration Scope** drop-down, select the scope of this configuration. The following describes some of the more important sections in the page.

## Frontend

This section determines how your products are shown on the frontend catalog pages.

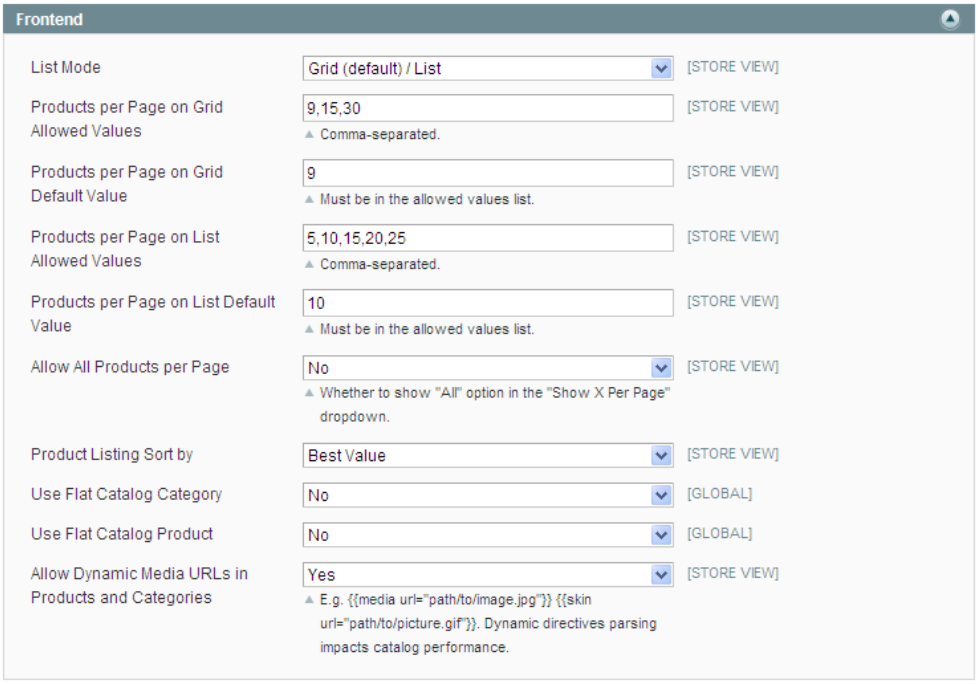



Figure 70. Catalog Frontend Configuration

- **List Mode**
  - **Grid Only**: The products are displayed only in a grid structure.
  - **List Only**: The products are displayed only in a list.
  - **Grid (Default)/List**: The products are displayed in a grid structure by default, but your customers are able to switch to list.
  - **List (Default)/Grid**: The products are displayed in a list structure by default, but your customers are able to switch to grid.
- **Products per Page**: For each display type (List and Grid), specify the following:
  - Specify, in a comma-separated list, what the options are for the number of products to display on a product page. These options will be listed in a drop-down list on the frontend.
  - Specify how many products are displayed on a page by default.
- **Allow All Products per Page:** Select whether the customers are allowed to display all products on a single category page.
- **Product Listing Sort By:** The products are sorted, by default, by the selected attribute. The **Best Value** products are featured products as determined by the store administrator; for more information, see “Creating Categories,” page 79. The customer can select from the other options on a per-page basis.

  You can configure attributes to be used for sorting using the **Used for Sorting in Product Listing** setting of an attribute. For details, see “Managing Product Attributes,” page 88.

- **Use Flat Catalog Category:** Selecting **Yes** "flattens" multiple category database tables into a single table for increased performance on the frontend. Magento recommends selecting **Yes** for any size catalog.
- **Use Flat Catalog Product:** Selecting **Yes** "flattens" multiple product database tables into a single table for increased performance on the frontend. Magento recommends selecting **Yes** if your catalog contains more than 1,000 SKUs
- **Allow Dynamic Media URLs in Products and Categories**: Selecting **No** can improve performance

## Sitemap

This section determines how your site map is displayed to customers.

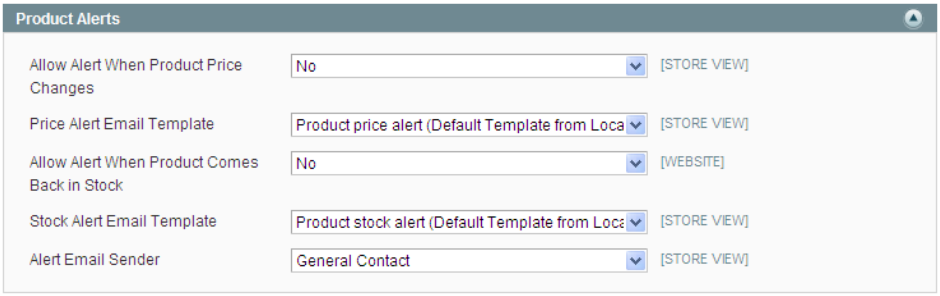
- **Use Tree Like Category Sitemap:** Selecting **Yes** displays the site map as a tree, showing all categories and subcategories as branches. Selecting **No** displays the categories and subcategories in a single column.
- **Minimum Lines per Page:** Determines the number of lines on each page when the site map is distributed among several pages.

## Product Reviews

This section enables unregistered guests in your store to write product reviews.

## Product Alerts

You can enable your customers to subscribe to two types of customer alerts by email: price change alerts and in-stock alerts. For each alert type, choose whether to enable users to subscribe to it, and select the email template to use. Also, select a sender display name, which applies to both alert types. For more information on how to configure email templates and email sender addresses, see "Customizing Transactional Emails," page 181.




The price change alert creates a **Sign up for price alert** link in every product page. Clicking this link subscribes your customers to this alert for that particular product so that they receive an email each time the product price is changed. This includes adding or changing **Special Prices** in addition to the regular **Price** field.

The in-stock alert creates a link called **Sign up to get notified when this product is back in stock** in every **Out of Stock** product. Clicking this link subscribes your customer to this alert so that they receive an email when the product status changes to **In Stock**.

For each product, there is a tab listing all the customers subscribed to either of these alerts.

## Product Alerts Run Settings

These settings enable you to select how often Magento CE checks for changes that require alerts to be sent. Additionally, you can select the recipient, sender, and template for emails that are sent if the sending of alerts fails.

- **Frequency:** Choose how often product alerts are sent out: **Daily**, **Weekly**, or **Monthly**.
- **Start Time:** Choose what time of day the product alert process starts. This time should be after any price or inventory updates are performed.
- **Error Email Recipient:** Identify the email address of the person (normally a store administrator) who should receive an email notification when there is an error in the product alert process.
- **Error Email Sender:** Select the role that the email will be "from."
- **Error Email Template:** Select the email template to use for product alert error notifications. For more information, see "Customizing Transactional Emails," page 181.

## Product Image Placeholders

This section enables you to specify an image for each of the sizes that are used instead of the product image, if it is missing.

## Recently Viewed/Compared Products

This feature is described in detail in "Recently Viewed," page 45. The configuration section enables you to specify how many products are shown by default in each list.

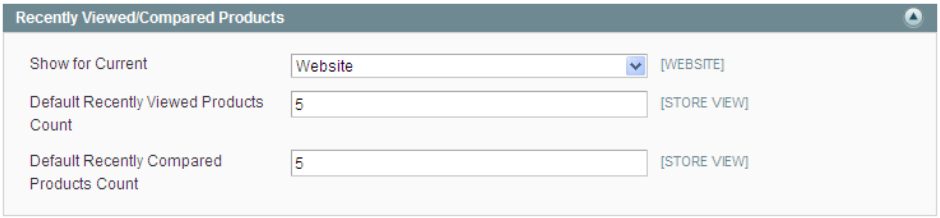



**Figure 71. Recently Viewed/Compared Products Settings**

## Price

The **Price** section contains only the **Catalog Price Scope** drop-down list, in which you can select the scope of the base currency (**Global** or **Website**).

## Layered Navigation

The **Layered Navigation** section enables you to choose whether the price ranges that are displayed in the layered navigation tool are calculated automatically or manually. If you select **Manual**, the **Default Price Navigation Step** field becomes visible, enabling you to specify the default size of the price ranges.

## Category Top Navigation

The **Category Top Navigation** section enables you to define how many levels of subcategories are displayed by clicking on a category in the top navigation bar on the frontend. Setting this value to 0 (zero) enables all levels to be displayed. If you have a large number of subcategory levels, this can potentially make it difficult for the user to navigate.

## Search Engine Optimizations

In order to make your site more search engine friendly, configure the following:

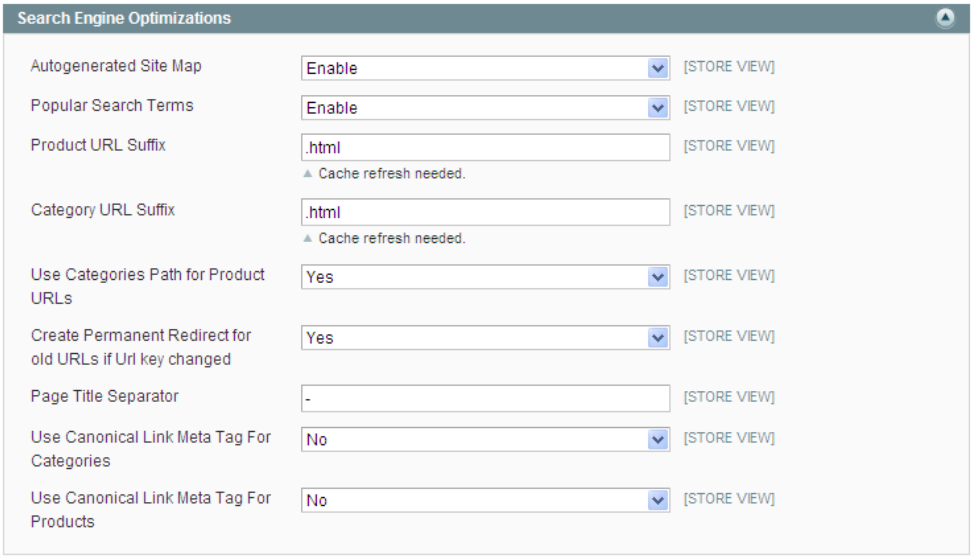



Figure 72. Search Engine Optimization Settings

- **Auto generated Site Map:** Enable this feature to display a **Site Map** link in the footer of the frontend pages. This enables a customer to view an automatically generated site map including a list of all of your existing categories. In addition to the auto-generated site map, Magento CE enables integration with Google Sitemap. More information is provided on the following pages.

- **Popular Search Terms:** Enable this feature to display a **Search Terms** link in the footer of the frontend pages. This enables customers to link to a list of all search terms. This is an SEO feature because each of these search terms counts as a link to your site and is explored by search engines to discover content on your site.
- **Product URL Suffix** and **Category URL Suffix**: These options determine which suffix is displayed on each product and category page. Typically this value will be **.html** or **.htm**. When you change this value (and click **Save Config**), you must perform a cache refresh by selecting **System > Cache Management** and clicking **Flush Magento Cache**.
- **Use Categories Path for Product URLs:** This option determines how the URL is composed. Select **Yes** to specify that the URL links for products include the associated category and a separate link is generated for each associated category. Select **No** to specify that the URL rewrites include only the product name and that there is only one link for each product, regardless of how many categories the product is associated with.
- **Create Permanent Redirect for old URLs if URL key changed**: Selecting **Yes** automatically creates a redirect for the old URL that points to the new URL if a page is moved. Doing so eliminates the "404 Not Found" error message that customers see if a page they had bookmarked is moved.
- **Page Title Separator**: Specify a character to replace the space character ( ) with when the system uses the page title to construct the page's URL. Typically you would use an underscore (_) or hyphen (-).
- **Use Canonical Link Meta Tag For Categories** and **Use Canonical Link Meta Tag For Products:** Select whether to add a tag to each category or product page that points to a "preferred" URL for search engines to index when encountering pages that contain the same content (but which may be sorted differently, for instance).

## Catalog Search

The options in this section define how the catalog search feature behaves.

- **Minimal Query Length**: Defines the minimum number of characters that the customer must specify in the **Search** field on the frontend.
- **Maximum Query Length**: Defines the maximum number of characters that the customer may specify in the **Search** field.
- **Maximum Query Words Count**: Define the maximum number of terms that can be specified in the **Search** field. This limit applies to the "Like" search type only.
- **Search Type**: Define the type of search that is performed:
  - **Like**: Includes only results that are close in spelling to the specified search terms.
  - **Fulltext**: Includes only results that exactly match the specified search terms.

- **Combine (Like and Fulltext)**: Includes both exact matches and close matches.

- **Apply Layered Navigation if Search Results are Less Than**: Defines the maximum number of results for which layered navigation can be applied. If the number of results is more than this number, then the results are presented as a simple list. If you specify 0, then layered navigation is always applied. Limiting the number of results can increase performance.

## Downloadable Products Options

This section controls the settings for products of Downloadable type. The most important settings are:

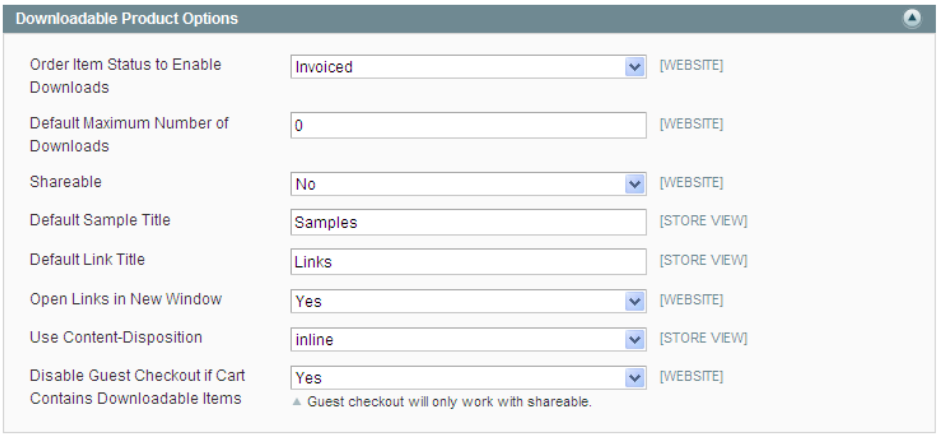



Figure 73. Downloadable Products Options

- **Order Item Status to Enable Downloads:** Controls whether customers can access their downloadable product links immediately after the order is placed or only after the invoice is created for the order.

- **Default Maximum Number of Downloads:** Controls how many times a downloadable product may be downloaded by the customer after it has been purchased.

- **Shareable:** Setting this option to **Yes** enables non-registered customers (guest customers) to access their downloads. This is the only option for customers to access their products if you want to offer guest checkout or quick checkout methods, such as PayPal Express or Google Checkout. This setting can be overridden at the product level.

- **Default Sample Title and Default Link Title:** These settings control what is displayed throughout the store when referring to samples and downloadable products (links).

- **Open Links in New Window**: Controls whether the download page opens in a new window.

- **Use Content-Disposition**: Controls whether the content is opened in a browser window or downloaded.

- **Disable Guest Checkout if Cart Contains Downloadable Items:** This setting disables the Guest Checkout option only if there are downloadable items in a cart, and leaves it enabled if a customer is purchasing other products. If you set this option to **Yes**, be sure to set the **Shareable** option to **Yes** as well.

### Date and Time Custom Options

The options in this section control how dates and times are displayed in your store.

- **Use JavaScript Calendar:** Enables your store to present a JavaScript-powered calendar date picker in any field that requires the customer to select a date. When this option is set to **No,** then drop-down lists are provided to select the date and time.
- **Date Fields Order** and **Time Format:** Select the order in which the day, month, and year values are presented in the format xx/yy/zz., and select a 12-hour (a.m./p.m.) or 24-hour time format. These fields are important for store views that are targeted for specific countries that use date and time formats that are different from your local custom.
- **Year Range:** Indicate the range of years that is available for selection in either the JavaScript calendar or calendar drop-down lists. Use a four-digit year format.

## Managing Categories

This section describes how to display, create, and edit categories and subcategories.

The products in the web store are grouped into categories. Categories enable you to give your store structure and form. In Magento CE, each store you create is assigned to a unique category. Any other category that you want to use in your store must be created as a subcategory. All categories are technically considered subcategories because you are placing them under the root category. See Figure 74.

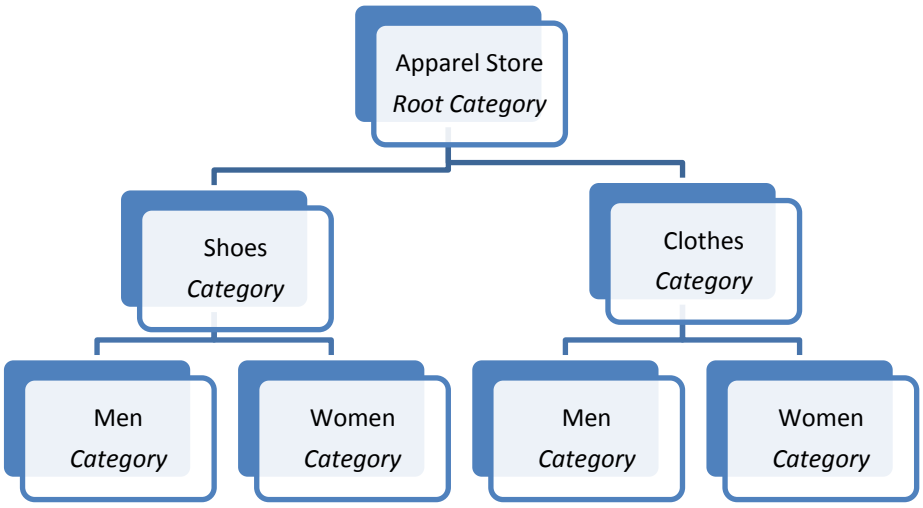



Figure 74. Example Category Structure

The way category names are displayed on the frontend depends on the layout. If the default theme is used for the web store, categories are shown in a bar near the top of the store web page.

Each product can be assigned to one or more categories, as described in "Finding the Right Products," page 38.

## Displaying Categories

### To display a list of all defined categories:

Select **Catalog > Manage Categories**. The categories are listed in a tree view on the left, as shown in Figure 75.

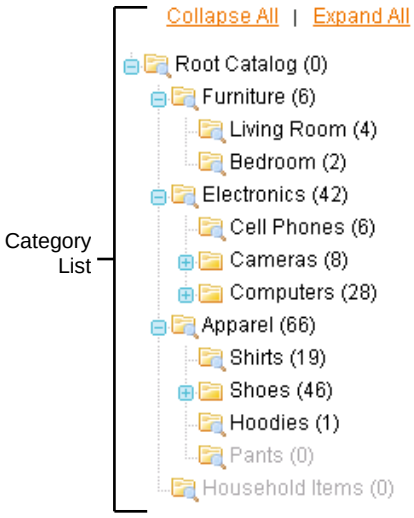



Figure 75. Category List

If you have loaded Sample Data, these sample categories (Furniture, Electronics and Apparel) will appear in the category tree. Disabled categories are listed in gray text.

## Creating Categories

This section describes the most important steps in creating a category.

### To create a new category:

- To create a new root category, make sure that **Choose Store View** in the upper-left corner of the page is set to **Default Config**, and click **Add Root Category**.
- To create a subcategory, select the parent category (it can be either a root category or a category) in the list and click **Add Subcategory**.

Four tabs of information are provided to describe this category: **General Information**, **Display Settings**, **Custom Design**, and **Category Products**. Click each tab and specify the requested information, as described below.

**Note:** Required fields appear with a red asterisk (*).

## General Information Tab

Most of the fields in this page are self-explanatory. In this tab, you are asked to provide a category name, description, images (used to represent your category) as well as meta keywords and description for better search engine positioning.

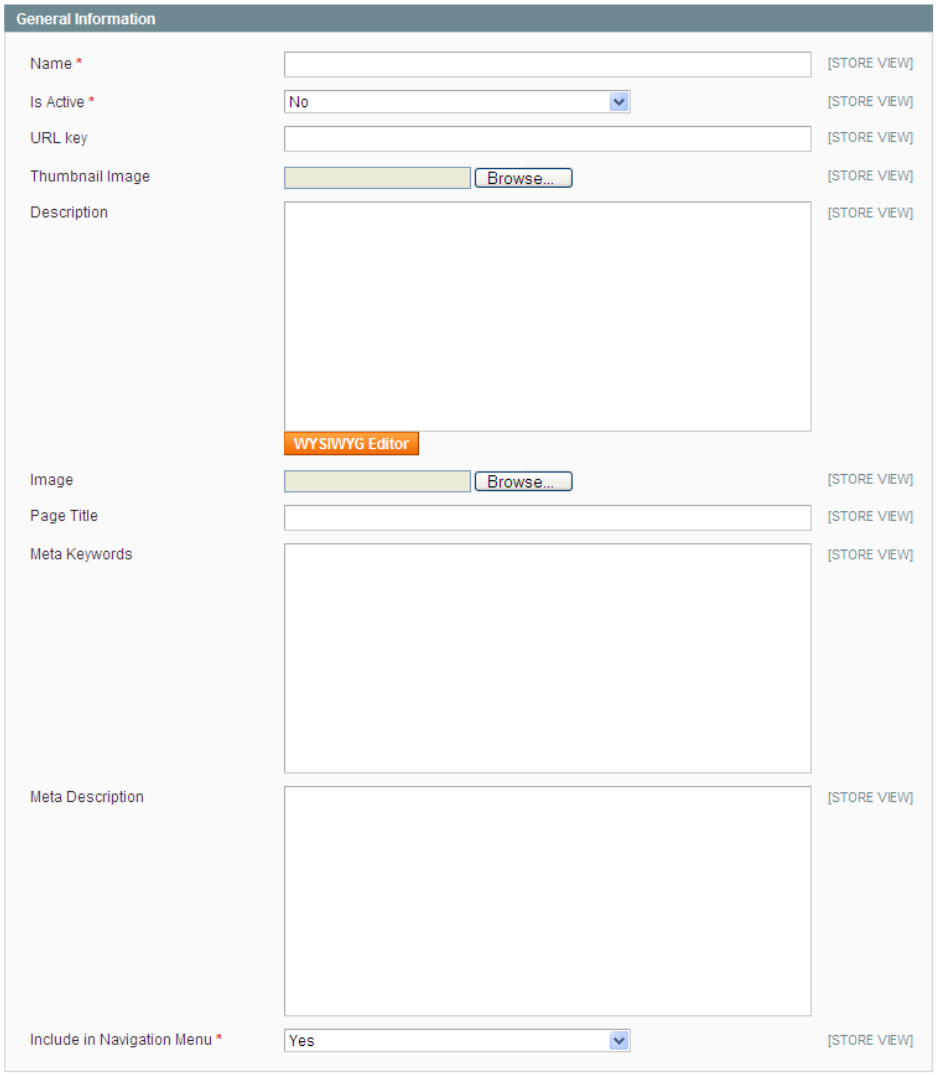



Figure 76. Create a New Category – General Information

1. Specify a name for this category in the **Name** field.
2. Set the **Is Active** field to **Yes** to specify that this category appears in the store.
3. In the **URL key** field you can specify a relative URL path which can be entered in place of the standard Target Path. It is "search engine friendly" because it can use the name of the category instead of the ID number. If you leave this field blank, Magento CE will automatically generate a URL with the name of the category upon creation of the category. If you enter a value here manually, you cannot use spaces in this field. The **URL key** field is not displayed for root categories.
4. For **Thumbnail Image**, use the **Browse** button to select and upload a thumbnail image to represent the category.
5. Specify a description in the **Description** text box. This description is presented on the frontend.

**Note:** You can use HTML tags in this text box. Alternatively, click the **WYSIWYG Editor** button to open a full-function HTML editor. The "What You See Is What You Get" (WYSIWYG) Editor includes a spelling checker, for which you need to download and install a plug-in for your browser.

6. The **Image** field is used for a category image. Click the **Browse** button next to the field to select the file. This image will appear in the frontend for each category's page between the category name and the content.
7. In the **Page Title** field, specify the title of the page, which will be displayed on the browser tab header when the customer opens this category page.
8. In the **Meta Keywords** and **Meta Description** text boxes, specify the keywords and description for search engines to use for this category when indexing your site.
9. Select **Yes** for **Include in Navigation Menu** so that the category will appear in the navigation menu on the frontend.
10. Click **Save Category** to save your changes.

## Display Settings Tab

The **Display Settings** tab enables you to specify how this category is presented to the customer.

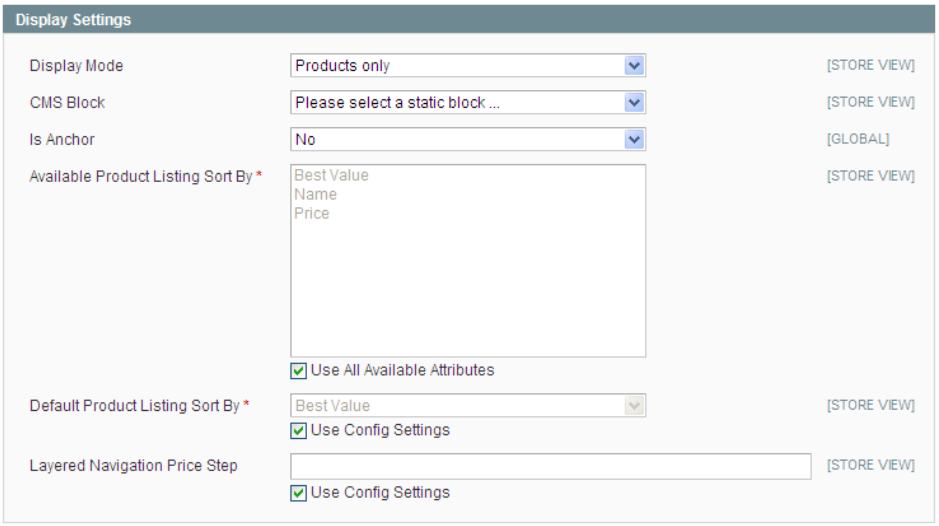



**Figure 77. Create a New Category – Display Settings**

1. In the **Display Mode** field, select one of the following options to specify how you would like your category page to appear:
   - Static block only
   - Static block and product list below it
   - Product list only
2. In the **CMS Block** field, select the static block that you would like to be shown for this category (if selected in the **Display Mode** field). This block must first be created in the CMS section; for more information, see "Managing CMS Pages," page 178.

- In the **Is Anchor** field, select **Yes** to specify that this category page is an anchor. Anchors are used for the layered navigation in Magento CE, as described in "Layered Navigation," page 84.
  - If you set the category to be an anchor for Layered Navigation, then your web store displays the subcategories of this category in the **SHOP BY** panel on the left. This area also shows a linked list of the filterable attributes of the products in this category and its subcategories.
  - Figure 78 shows the **SHOP BY** panel for the Apparel category, which is set as an anchor.

**Figure 78. Anchored Category**

3. For **Available Product Listing Sort By**, specify the attributes by which the customer can sort the list of products in this category. By default, all available attributes can be used for sorting; clear the **Use All Available Attributes** check box to modify the list.
4. For **Default Product Listing Sort By**, select the attribute by which the product list is sorted by default. This is set in the catalog configuration (see "Setting Up Catalog Defaults," page 70), but you can clear the **Use Config Settings** check box to select a default sorting attribute for this particular category.
5. For **Layered Navigation Price Step**, specify the size of the price range to be used when calculating the price "buckets" for the Layered Navigation. This is set in the catalog configuration, but you can clear the **Use Config Settings** check box to specify a price range size for this particular category.

## Custom Design Tab

The **Custom Design** tab contains additional settings to control the theme and layout updates that are used for this category page. Depending on the settings they can also affect child pages as well. All of these settings are optional. For more information about custom designs and page layouts, see "Design and Content," page 173.

1. For **Use Parent Category Settings**, choose **Yes** to "inherit" the settings of this subcategory from its parent category. Doing so ensures a consistent look within a category family, and disables all other settings on this page. This setting is not available for root categories.
2. For **Apply to Products**, select **Yes** to apply the category page settings to the product pages of the products in this category.

3. Select a custom design from the **Custom Design** drop-down list. Magento CE comes with several custom designs already defined, and you can modify these custom designs or create your own. For more information, see "Managing CMS Pages," page 178.
4. For the **Active From** and **Active To** fields, select the start and end dates for this custom design to be applied to this category. If you do not select a start date, the custom design is applied immediately. If you do not select an end date, the custom design is applied to this category until you manually deactivate it.
5. For **Page Layout**, select a layout from the drop-down list.
   - **No layout updates**: Uses the default settings that come with the Magento CE installation
   - **Empty**: Displays the category page without any objects, except for the content (products or static blocks only), category name, and view options (number to display per page, view as grid or list, and sort be options)
   - **1 column**: Displays the contents, category name and view options, as well as the header, footer, search field, and navigation bar
   - **Column on the left:** Adds the left column to the 1 column display, which by default includes the currency selection and layered navigation
   - **Column on the right:** Adds the right column to the 1 column display, which by default includes the shopping cart view, wishlist, compared products list, polls, and newsletter sign-up
   - **3 columns:** Displays both the left and the right columns
6. The **Custom Layout Update** is essentially a static block, with a few differences. Rather than HTML, the structure must be in XML format. The Update will appear at the bottom of the page, below the products, whereas a static block will appear above the products (if the static block is set to display with products). The custom layout update will appear on the page only during the dates specified in the **Active From** and **Active To** date range.
7. Click **Save Category** to save your changes.

## Catalog Products Tab

This tab enables you to specify the products that belong to this category.

> **Note**: You can also assign a product to a category when editing a product's record. For more information, see "Managing Products," page 95.

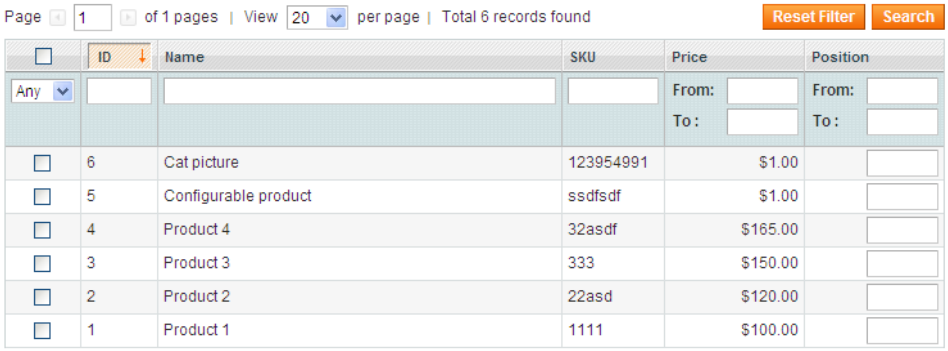



Figure 79. Creating a New Category – Products

1. If needed, use the filter fields at the top of the table to filter the list of products. Click **Reset Filter** to clear all filter settings.
2. Select the check box in the left column for each product that belongs in this category. Remember that a product can be assigned to more than one category.
3. In the **Position** column, specify a whole number that indicates the order in which the product is listed when the products are sorted by **Best Value**. The product with a **Position** value of 1 is listed first, 2 is listed second, and so on. If more than one product has the same value for **Position**, the product with the lowest (that is, closest to 1) ID number is listed first.
4. Click **Save Category** to save your changes. You may need to refresh the page to display the category in the tree.

## Editing Categories

### To edit a Category:

Click on a category in the tree, edit its information and click **Save Category**.

## Layered Navigation

### What is Layered Navigation?

Of course, you want the customers browsing through your site to find the products that interest them in the fastest possible way. Otherwise, your sales opportunities are lost. When a customer is confronted with a category containing 60 products spread across multiple pages, most customers simply leave the site when they cannot find what they need on the first page. Magento CE enables you to provide customers with the option to find the products that they want by making a selection from a variety of filters, such as price, manufacturer, or any other aspect of the products, as shown in Figure 80. Layered navigation information is shown on category listing pages while searching for products. Show your customers what they want and you will raise conversions!

The example in Figure 80 shows an enabled layered navigation filter by PRICE range and COLOR.

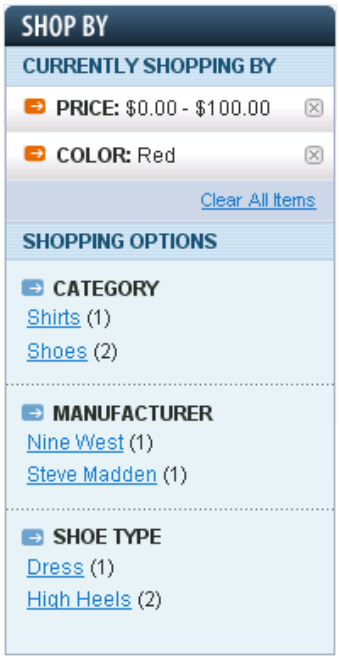



Figure 80. Layered Navigation

## Default Layered Navigation

In Magento CE, two properties appear as navigation filters by default: **PRICE** and **CATEGORY**.

- **PRICE:** Price ranges are selected logically in order to provide another filter for navigation. The ranges themselves are determined by the prices of products contained within them. There are never more than ten price ranges displayed at a time and products are distributed accordingly.
- **CATEGORY:** If you define a category as an **Anchor Category** (see "Display Settings Tab," page 81), its subcategories are displayed as layered navigation options. Figure 80 shows that the first filter is **CATEGORY** and it features two options: Shirts and Shoes. In this example, Shirts and Shoes are subcategories of the category that is represented by this layered navigation block.

# Defining Layered Navigation Filters

The additional filters in Figure 80 are **Manufacturer** and **Shoe Type**. These are product attributes that have been selected as filterable. This is defined in the **Use in Layered Navigation** field under **Catalog** > **Attributes**, as described on page 89.

There are two types of filterable attributes:

- **Filterable (with results):** Links appear only for values where the number of results (the number in parentheses next to each value) is greater than zero.
- **Filterable (no results):** Links appear for all values, regardless of the number of results.

In order for an attribute to appear as a layered navigation filter, the **Catalog Input Type for Storeowner** must be **Dropdown**, **Multiple Select** or **Price**. This controls the number of possible filter options and makes them consistent.

## Price Layered Navigation

The Price Layered Navigation algorithm enables you to create price ranges so that products are evenly distributed among ranges. You can also split each range iteratively.

The enhanced configuration controls for the Price Layered Navigation feature were introduced in Magento CE version 1.7 and Magento EE version 1.12.

### Configuring the Price Layered Navigation Algorithm

The algorithm for calculating the price layered navigation is configured in the Magento Admin Panel under **System** > CATALOG > **Catalog** > **Layered Navigation**.

#### To set and configure the new price layered navigation algorithm:

1. Log in to the Magento Admin Panel.
2. Navigate to **System** >**Configuration** > CATALOG > **Catalog**.
3. In the **Current Configuration Scope** in the upper-left corner of the page select the desired store view.
4. Expand the **Layered Navigation** field set. In the **Display Product Count** field, decide whether the number of products which fall into a price range will be displayed.
5. In the **Price Navigation Step Calculation** field select **Automatic (equalize product counts)**. Additional options appear.

   Note: The **Automatic (equalize price ranges)** option of the **Price Navigation Step Calculation** field is similar to the **Automatic** option which was available in the previous versions of Magento. If you select the **Automatic (equalize price ranges)** option, the previously existing price layered navigation algorithm will be used.

6. In the **Display Price Interval as One Price** field, decide what will be the system behavior if all products which fall into a certain price range have the same price. Select **Yes** if you want to display a single price (not the range finite values).
7. In the **Interval Division Limit** field, specify the threshold for a number of products within a price range after which the range cannot be further split. The default value is 9.
8. To save the changes click **Save Config**.

### Price Layered Navigation Algorithm: Store Customer Experience

The price layered navigation algorithm provides the optimal distribution of products among price ranges. In addition, the feature provides iterative splitting of price ranges.

Previously, if a customer selected to view products from a certain price range, there was no further subdivision to smaller price ranges on the resulting catalog page. For example, if a store customer clicked the **$0.00-$99** range, the price filter on the page with a list of products contained the selected range only. See Figure 81.

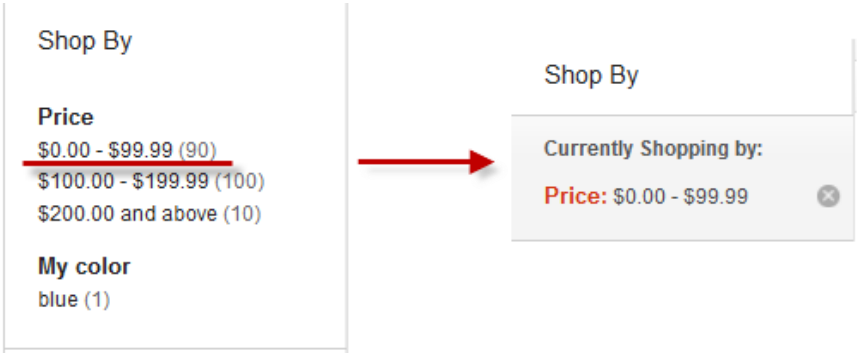



**Figure 81. Store customer experience with price layered navigation in Magento Enterprise 1.11 and earlier**

With the iterative splitting feature, after a customer chooses to view the **$0.00-$99** range, the price filter on the page with a list of products can contain several sub-ranges. See Figure 82.

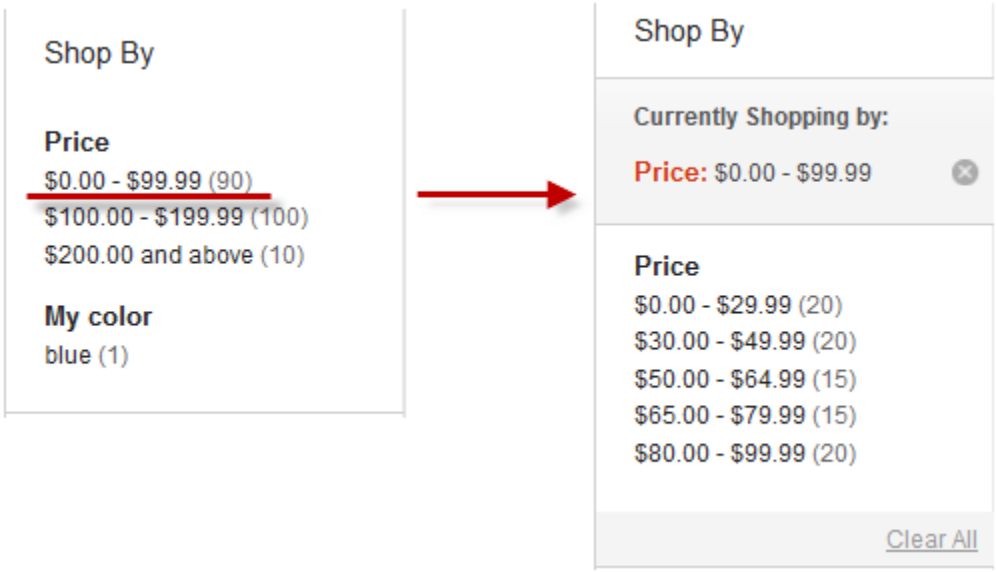



**Figure 82. Store customer experience with price layered navigation in Magento Enterprise 1.12**

**Note**: A price range is not further splitted after the number of products which fall into this range reaches the threshold set in the **Interval Division Limit** field under **System** > **Configuration** > CATALOG > **Catalog** > **Layered Navigation**.

# Managing Product Attributes

## What is an Attribute in Magento?

An attribute represents a property of a product, such as: its name, image, SKU, color, manufacturer, and so on. Attributes enable you to add new product properties without having to write a single line of code or to add any columns to your database. Understanding attributes is crucial for making your store easy to use for customers.

You assign attributes to your products in order to enable your customers and search engines to find them more easily. Your Magento CE web store automatically displays products according to their attributes, for easy accessibility by your customers, in the **SHOP BY** layered navigation panel on the left of your web store, as shown in Figure 83.

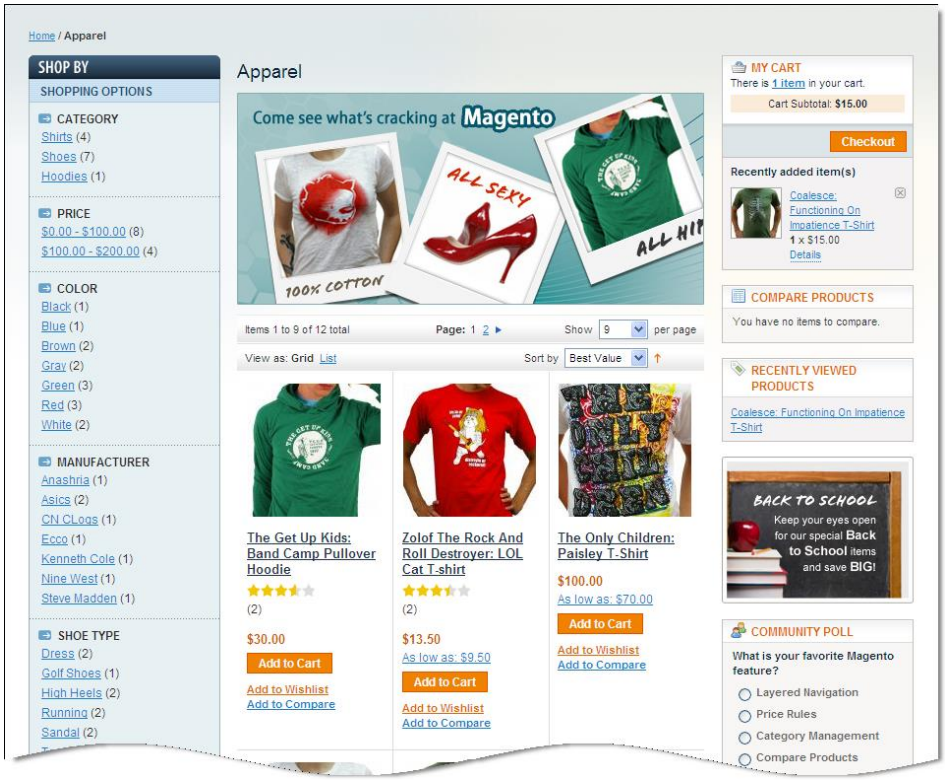



**Figure 83. Category Page with Layered Navigation**

Attributes also determine which products are displayed when a customer performs a search for a keyword.

**System attributes** define the properties that are required by the store to function properly. These attributes cannot be deleted.

You can add as many additional attributes as desired. In the Magento CE backend you can define attributes in sets. Attribute sets ease the definition process so that similar products can be created with the same attributes. Attribute sets enable you to assign multiple attributes to a product at one time by assigning an entire attribute set to a product.

If a store sells televisions, shoes, books, and power tools, then four attribute sets could be defined: one specific to televisions, one for shoes, and so on. When a new power tool product is added to your catalog, you can simply select the "Power Tool" attribute set to add the relevant attributes to this product.

You should first define attributes, then define attribute sets and assign the relevant attributes to the attribute sets, as described in this section.

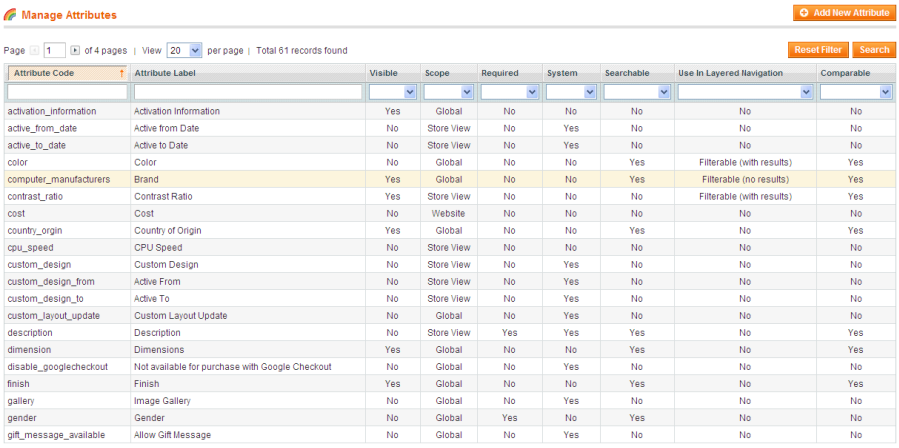
## Creating Attributes

Attributes must be defined before defining attribute sets and products.

**Note:** Only attribute sets can be assigned to a product, not individual attributes.

### To define attributes:

1. Select **Catalog** > **Attributes** > **Manage Attributes**. A list of existing attributes is displayed, as shown in Figure 84.




| Attribute Code | Attribute Label | Visible | Scope | Required | System | Searchable | Use In Layered Navigation | Comparable |
|---|---|---|---|---|---|---|---|---|
| activation_information | Activation Information | Yes | Global | No | No | No | No | No |
| active_from_date | Active from Date | No | Store View | No | Yes | No | No | No |
| active_to_date | Active to Date | No | Store View | No | Yes | No | No | No |
| color | Color | No | Global | No | No | Yes | Filterable (with results) | Yes |
| computer_manufacturers | Brand | Yes | Global | No | No | Yes | Filterable (no results) | Yes |
| contrast_ratio | Contrast Ratio | Yes | Store View | No | No | No | Filterable (with results) | Yes |
| cost | Cost | No | Website | No | No | No | No | No |
| country_orgin | Country of Origin | Yes | Global | No | No | Yes | No | Yes |
| cpu_speed | CPU Speed | No | Store View | No | No | No | No | No |
| custom_design | Custom Design | No | Store View | No | Yes | No | No | No |
| custom_design_from | Active From | No | Store View | No | Yes | No | No | No |
| custom_design_to | Active To | No | Store View | No | Yes | No | No | No |
| custom_layout_update | Custom Layout Update | No | Global | No | Yes | No | No | No |
| description | Description | No | Store View | Yes | Yes | Yes | No | Yes |
| dimension | Dimensions | Yes | Global | No | No | Yes | No | Yes |
| disable_googlecheckout | Not available for purchase with Google Checkout | No | Global | No | Yes | No | No | No |
| finish | Finish | Yes | Global | No | No | Yes | No | Yes |
| gallery | Image Gallery | No | Global | No | Yes | No | No | No |
| gender | Gender | No | Global | Yes | No | Yes | No | No |
| gift_message_available | Allow Gift Message | No | Global | No | Yes | No | No | No |

**Figure 84. Manage Attributes Page**

2. Click **Add New Attribute** to display the New Product Attribute page (Figure 85) in which you can define a new attribute.

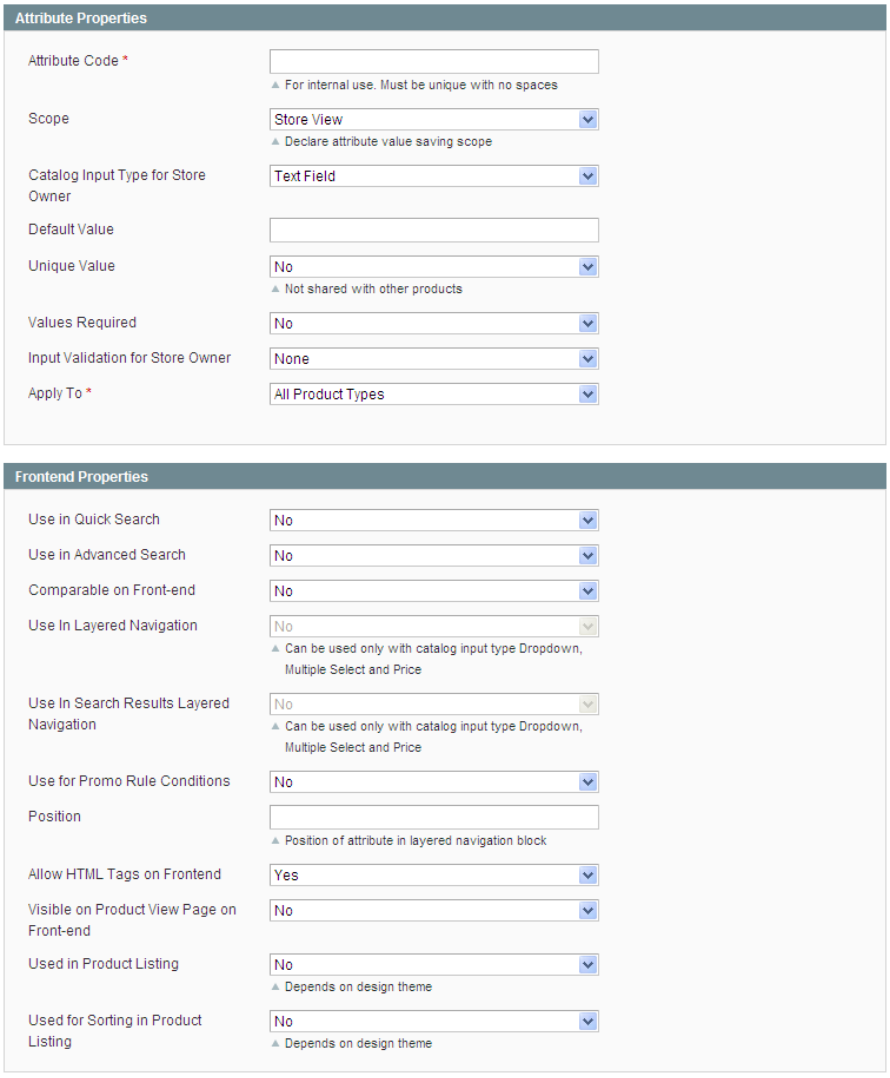



Figure 85. New Product Attribute Page

3. In the **Attribute Code** field, specify a unique identifier for this attribute. Do not use spaces. The code does not appear on the frontend.
4. In the **Scope** field select the scope to which this attribute applies.
5. The **Catalog Input Type for Store Owner** setting controls how a store administrator specifies values for attributes. For descriptive textual attributes, you can use the **Text Field** or **Text Area** types; for list prices you use the **Price** type. Note that not all types can be used for layered navigation.
6. If this attribute has a default value, specify it in the **Default Value** field.
7. If the value of the attribute must be unique for each product (for example, a SKU number), select **Yes** for **Unique Value**.
8. If the value of the attribute cannot be blank for any product, select **Yes** for **Values Required**.

9. In the **Input Validation for Store Owner** field, select the type of validation that should be enforced on values of this attribute. For example, if the values of this attribute will be email addresses, select **Email** to cause the system to check each entered value of this attribute against the rules for valid email addresses.

10. If this attribute will apply only to certain Magento CE product types, select **Selected Product Types** for **Apply To**. In the list that appears, select one or more product types for this attribute (use Ctrl+click to select multiple items).

11. For **Use in Quick Search** and **Use in Advanced Search**, select **Yes** to enable the quick search and advanced search tools to search this attribute's values.

12. For **Comparable on Front-end**, select **Yes** to have this attribute appear in the compare window when products are compared.

13. The **Use in Layered Navigation** field defines whether the attribute is used in layered navigation. The following options are available:

    - **Filterable (with results)**: Only those attribute values that correspond to the existing products in your frontend catalog will be used in the layered navigation.
    - **Filterable (no results)**: All values of the attribute that you have created on the **Manage Label / Options** tab will be listed.
    - **No**: Not used in layered navigation.

    Note that only attributes with the **Dropdown**, **Multiple Select**, or **Price** input type can be used in layered navigation.

14. The **Use for Promo Rule Conditions**, field defines whether the attribute can be used in defining conditions for catalog and shopping cart price rules.

15. The **Position** parameter determines the position of the attribute in the layered navigation block with respect to other filterable attributes.

16. In the **Visible on Product View Pages on Frontend** field, select **Yes** to specify that this attribute appears in the **Additional Information** part of a product's page in the web store, as shown in Figure 86.

**Additional Information**

| | |
|---|---|
| Model | LX.FR206.001 |
| Brand | Acer |
| In Depth | • Mobile AMD Athlon 64 2800+<br>• 1MB L2 Cache<br>• 512MB of PC2700 DDR333 SDRAM<br>• 2 RAM Slots (0 open - upgrading requires chip removal)<br>• RAM is upgradeable to 2GB |
| Screensize | 15-inch, 200-nit, high-brightness TFT LCD screen |
| Hardrive | 80 gig Western Digital |
| Processor | Mobile AMD Athlon 64 2800+ |
| Memory | 512MB of PC2700 DDR333 SDRAM |

Figure 86. Attributes on the Additional Information Panel

17. For **Allow HTML Tags on Frontend**, select **Yes** to enable HTML tags that are specified in this attribute's values to be honored on the frontend.

18. For **Used in Product Listing**, select **Yes** to list values of this attribute in the product listing.

19. For **Used for Sorting in Product Listing**, select **Yes** to enable the product list to be sorted by values of this attribute.

20. Click **Manage Label/Options** at the top left of the page to display the Manage Label/Options page, as shown in Figure 87.

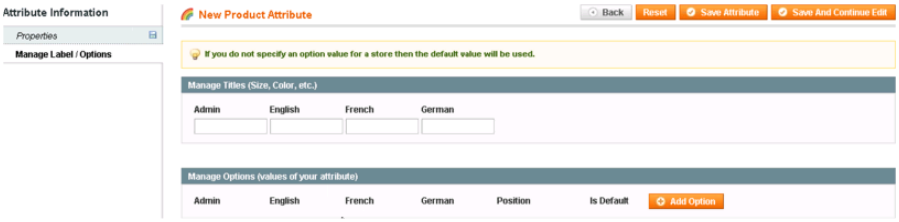



Figure 87. Manage Label/Options Page

21. In the **Mange Titles** box, specify a display name for this attribute for each store view. If you specify a value only in the **Admin** field, that value will be used in all cases.

22. For attributes with an input type of **Dropdown** or **Multiple Select**, you can enter values that can be specified for the attribute. To add a value, click the **Add Options** button. You can specify a different label for the value for each store view and set the default value by selecting the **Is Default** option button. For the **Dropdown** input type, you can select the **Is Default** option button only for one attribute value. For the **Multiple Select** input type, you can select multiple values by selecting the **Is Default** check box next to the desired attribute values.

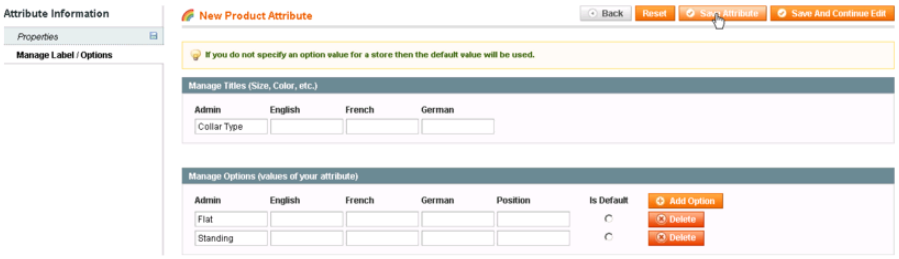



Figure 88. Attribute Value Specifications

23. Click **Save Attribute**.

# Creating Attribute Sets

An attribute set is a collection of attributes, customized to fit certain types of products. All attribute sets must contain all of Magento's system attributes, but you can customize them to include different combinations of simple attributes. Only attribute sets (not individual attributes) can be assigned to a product. If you want to add a small number of attributes, you can add them to the Default set, but if you want to add attributes that will be applied only to a subset of products, it is advisable to create an attribute set for each set of attributes that you want to assign to products. An attribute set can inherit attributes from another attribute set. This feature saves you from redefining sets of attributes that apply to many different products.

## To create a new attribute set:

1. In the Admin Panel, select **Catalog > Attributes > Manage Attribute Sets**. A list of existing attribute sets is displayed, as shown in Figure 89.

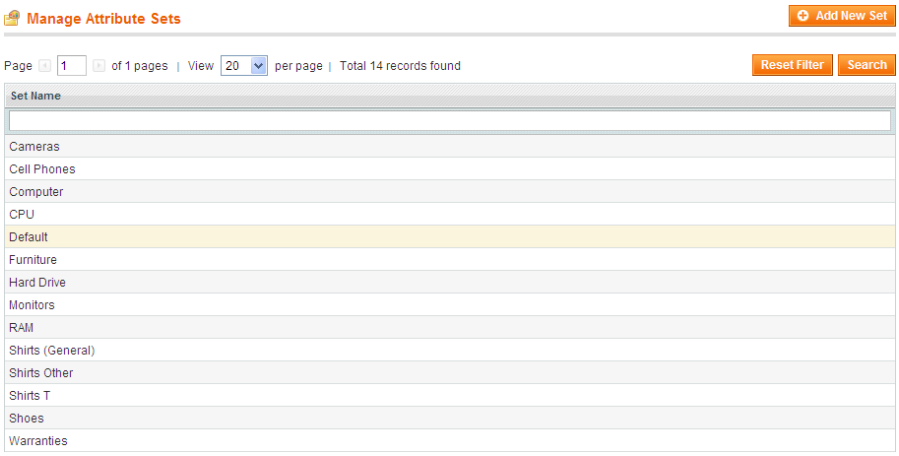



**Figure 89. Manage Attribute Sets Page**

**Note:** Figure 89 shows the attribute sets that are provided in Magento's Sample Data.

**Note:** The Default attribute set is composed mostly of system attributes. This attribute set is typically inherited by all other attribute sets.

2. Click the **Add New Set** button to display the Add New Attribute Set page (Figure 90).

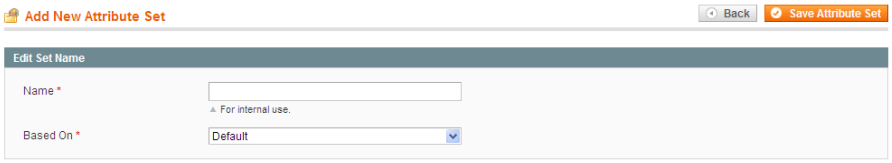



**Figure 90. Add New Attribute Set Page**

3. In the **Name** field, specify the name of this attribute set. This name is used only in the backend.

4. In the **Based On** field, select another attribute set from which this attribute set is to inherit. This enables you to reuse the attributes that are already defined in a set to build other attribute sets. The simple option is to leave the **Default** option that appears in this field.

   Click **Save Attribute Set** to display the Edit Attribute Set page (Figure 91).

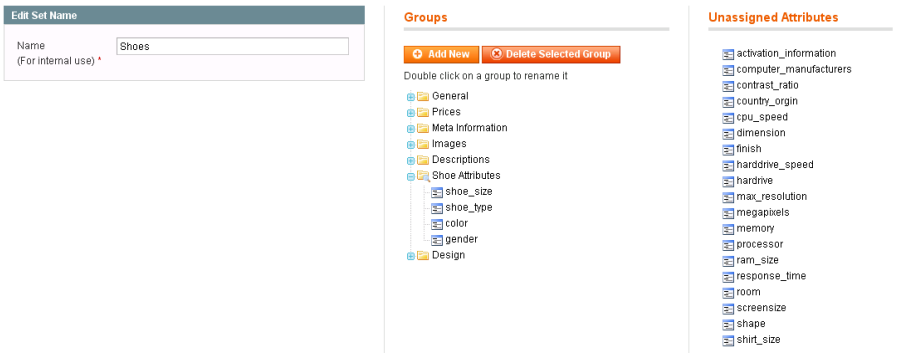



**Figure 91. Edit Attribute Set**

**Note:** System attributes are indicated by an icon with an orange dot.

The top left of the page shows the name of the attribute set that you are defining. The center of the page shows a hierarchical tree representing groups of attributes. An attribute group is a logical grouping of attributes within an attribute set. See "Creating a New Attribute Group," page 94, for a description of how to define attribute groups.

The right side of the page shows a list of attributes defined in other attribute sets and not assigned to this attribute set.

5. Assign attributes to this attribute set by dragging them from the **Unassigned Attributes** area on the right into a group in the tree in the **Groups** area.

## Creating a New Attribute Group

The center of the Edit Attribute Set page shows a hierarchical tree representing groups of attributes.

Attribute groups can be thought of as folders that contain attributes. Each group corresponds to a different tab on the product page in the backend. Magento CE comes with six attribute groups by default: General, Prices, Meta Information, Images, Recurring Profiles, Design, and Gift Options. They contain the various system attributes. System attributes cannot be removed from an attribute set; however, they can be moved to other attribute groups. Therefore, you can remove an attribute group as long as there are no system attributes within it. The order of both the attribute groups and the attributes can be changed by selecting and dragging them. This affects the order of tabs and attributes on the product page in the backend, respectively. You can also create a new attribute group, to which you can move system attributes, or associate simple attributes.

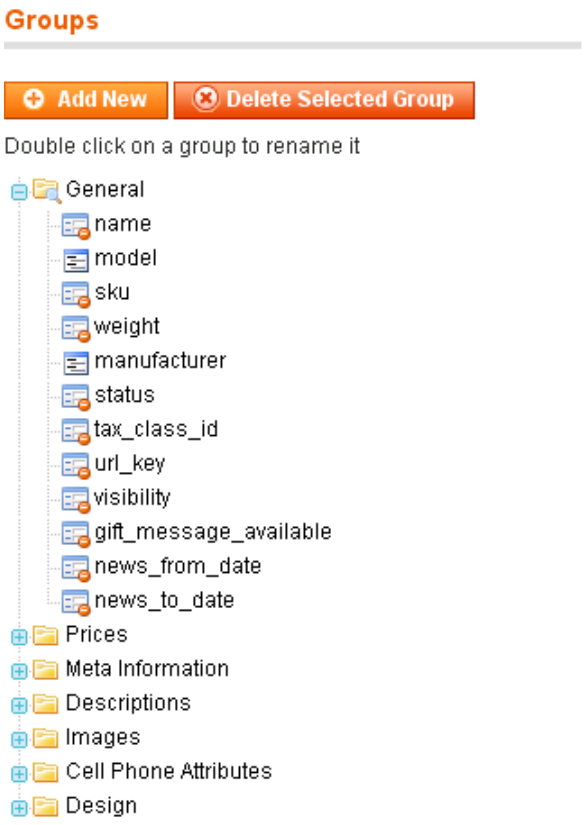



Figure 92. Attribute Groups

To create a new attribute group:

1. Click **Add New** in the **Groups** area to display a popup window asking for the group name.
2. Specify the name of the new group and click **OK**.
3. Click and drag attributes from the **Unassigned Attributes** area into the newly created group to assign them to this group.
4. You can also click and drag attributes that are already assigned to move them between groups.

# Managing Products

This section describes how to define and edit products.

**Tip:** You should first define attributes and an attribute set, as described in "Managing Product Attributes," page 88, before you define products that have those attributes.

## Product Types

Magento CE offers a variety of product types that enable significant flexibility when defining products. The following lists the available product types and their typical usage:

- **Simple Product:** This is the most basic product type. It is suitable for all kinds of physical (shipped) products.
- **Grouped**: This option enables you to display several similar products on a single page. For example, if you are selling chefs' knives and you have the same knife in four sizes, you can make a grouped product to display all four of these sizes. Customers can select the size(s) that they want and the quantity they need, and add them to the cart from this page.
- **Configurable**: This product type enables your customers to select the variant that they want by choosing options. For example, you can sell T-shirts in two colors and three sizes. You would have to create six variants as individual products (each with its own SKU) and then add these six to a configurable product where customers can choose the size and color, and then add it to their cart. A very similar functionality is possible by using Custom Options for Simple products. The difference between a configurable product and a product including custom options is that inventory is not checked or updated for individual options during the purchase of the latter and there is no possibility to go directly to a product with a given set of options. This also makes it hard for a search engine to find the product option.
- **Virtual Product:** This is a product that does not require shipping or inventory. It is generally used for warranties or services.
- **Downloadable Product:** This is a digitally downloadable product that sells one or more files of a product and provides samples of those files. These downloadable files can reside on your server or be provided as URLs to any other server.
- **Bundle:** This product is composed of components that are presented in different ways and are made from existing products. A good example of a bundle is a complete computer. For this computer, you can configure how much RAM or what kind of monitor is included with this computer in your store.

## Creating a New Product

The following steps are the same for all product types. Subsequent sections describe the differences between each of the product types.

### To create a new product:

1. In the Admin Panel, select **Catalog > Manage Products** to display the Manage Products page, as shown in Figure 93.

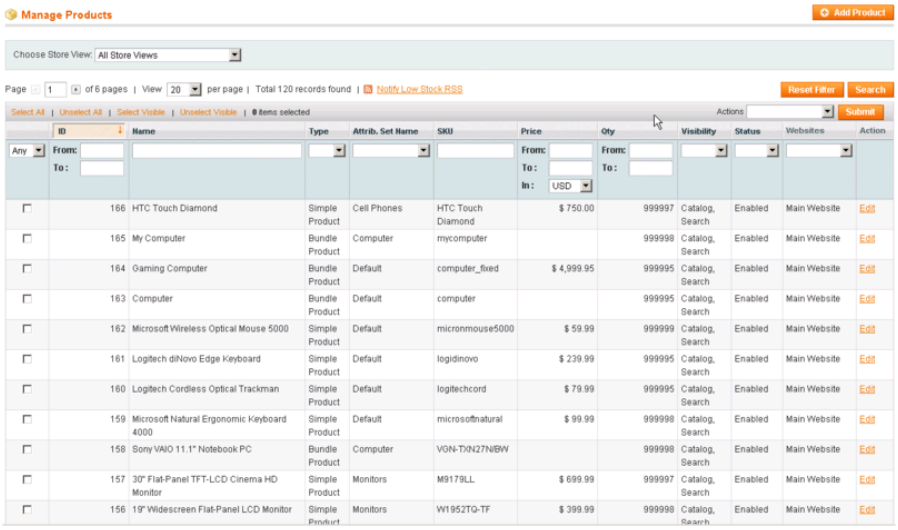

Manage Products
Add Product
Choose Store View: All Store Views
Page 1 of 6 pages | View 20 per page | Total 120 records found | Notify Low Stock RSS
Reset Filter
Search
Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected
Actions
Submit
ID
Name
Type
Attrib. Set Name
SKU
Price
Qty
Visibility
Status
Websites
Action
166 HTC Touch Diamond Simple Product Cell Phones HTC Touch Diamond $ 750.00 999997 Catalog, Search Enabled Main Website Edit
165 My Computer Bundle Product Computer mycomputer 999998 Catalog, Search Enabled Main Website Edit
164 Gaming Computer Bundle Product Default computer_fixed $ 4,999.95 999995 Catalog, Search Enabled Main Website Edit
163 Computer Bundle Product Default computer 999995 Catalog, Search Enabled Main Website Edit
162 Microsoft Wireless Optical Mouse 5000 Simple Product Default micronmouse5000 $ 59.99 999999 Catalog, Search Enabled Main Website Edit
161 Logitech diNovo Edge Keyboard Simple Product Default logidinovo $ 239.99 999995 Catalog, Search Enabled Main Website Edit
160 Logitech Cordless Optical Trackman Simple Product Default logitechcord $ 79.99 999995 Catalog, Search Enabled Main Website Edit
159 Microsoft Natural Ergonomic Keyboard 4000 Simple Product Default microsoftnatural $ 99.99 999998 Catalog, Search Enabled Main Website Edit
158 Sony VAIO 11.1" Notebook PC Bundle Product Computer VGN-TXN27N/BW 999998 Catalog, Search Enabled Main Website Edit
157 30" Flat-Panel TFT-LCD Cinema HD Monitor Simple Product Monitors M9179LL $ 699.99 999997 Catalog, Search Enabled Main Website Edit
156 19" Widescreen Flat-Panel LCD Monitor Simple Product Monitors W1952TQ-TF $ 399.99 999998 Catalog, Search Enabled Main Website Edit

Figure 93. Manage Products Page

**Note:** Figure 93 shows the products defined in the Sample Data provided with Magento. If you downloaded Sample Data, as described in the **Step 2: Downloading Sample Data** section on page **11**, then you may want to leave the products in for you to refer to as examples and delete them later.

2. Click **Add Product** on the top right of the page to display the New Product page (Figure 94).

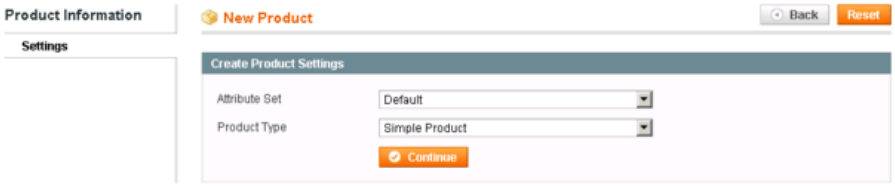



Figure 94. New Product Page

## Product Wizard, First Page

The New Product page is the first page of a product definition wizard that walks you through the process of defining a product.

1. In the **Attribute Set** field, select the attribute set that contains the attributes that best describe this product. See "Managing Product Attributes," page 88, for a description of how to define attributes.
2. In the **Product Type** field, choose the type of product you want to create.
3. Click **Continue** to display the **General** tab, as shown in Figure 95. (This tab may look different depending on the product type that you choose.).

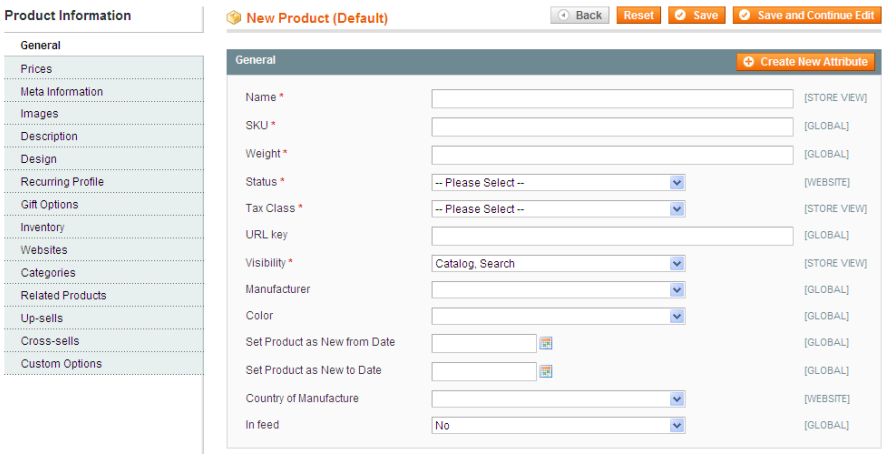



Figure 95. General Tab

## General Tab

Fill in all the mandatory fields, which are indicated by a red asterisk (*).

- **Name:** The product name as it appears in the frontend.
- **SKU:** The product's store keeping unit (SKU). Magento CE uses SKU as a unique identifier for this product. SKU is global, meaning if you update the SKU for a product in one web store, it updates in all other web stores as well.
- **Weight:** The product's weight. This value is usually used for shipping calculations. Specify only the number. Shipping service providers will interpret it according to the measurement units they use.
- **Status:** Select **Enabled** to make this product available on the frontend.
- **Tax Class:** The tax class of the product. See "Product Tax Class," page 135, for more information.
- **Visibility:** Determines whether the product is displayed in the catalog pages and/or search results. The following options are available:
  - **Not Visible Individually** - The product will not be displayed individually in the frontend; however, it can be a component of a composite, configurable, bundle, or grouped product.
  - **Catalog** - The product will displayed on pages of categories it is associated to, but it will not appear in search results.
  - **Search** - The product will be displayed when your customers search for it either using the quick or Advanced Search tools, but will not be displayed on the related category page.
  - **Catalog, Search** - The product will be available on category view pages to which it is associated and on the search result page.

The following describes the other fields in this page:

- **URL key:** The search engine-friendly URL identifier is the name used for this product in the product's URL. You cannot use spaces in this field. If the URL key is left blank, one is automatically generated by Magento CE.
- **Manufacturer:** Select the name of the manufacturer from the drop-down list.
- **Color:** Select the color of the product, if applicable.
- **Set Product as New from/to Date**: The date range in which this product can be promoted as a new product in various locations throughout your site.
- **Country of Manufacture:** Select the country in which the product was manufactured.
- **In feed:** Determines whether this product is included in your store's product RSS feed.

**Note:** Additional fields may appear on this (and other pages) if you add attributes to the Default attribute set or base the product on another attribute set.

**Note:** The **Create New Attribute** button opens a popup window that enables you to enter an attribute to be added to the selected attribute set. However, we recommend defining the attributes structure first.

## Prices Tab

Click the **Prices** tab in the **Product Information** panel on the left to display the **Prices** tab, as shown in Figure 96.

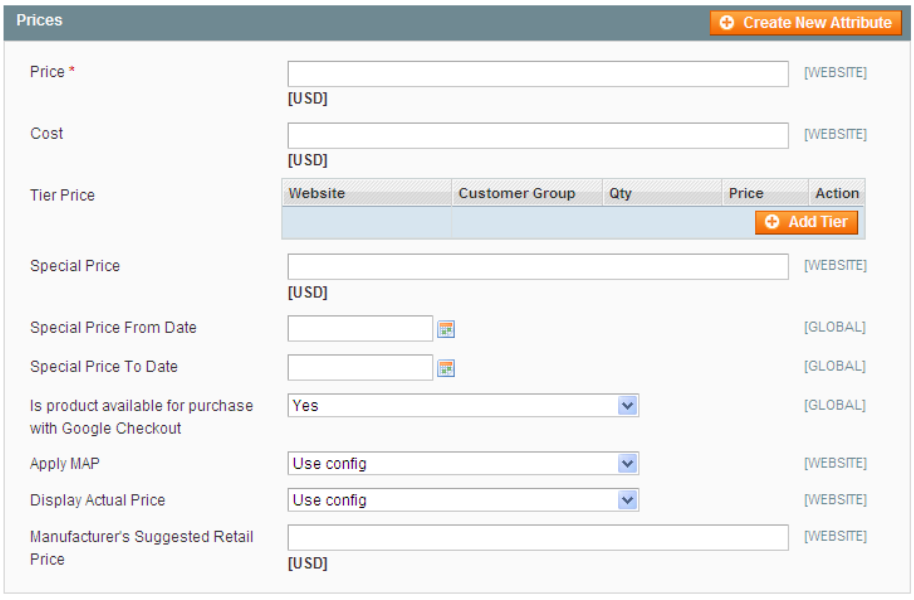



**Figure 96. Prices Tab**

Fill in all the mandatory fields, which are indicated by a red asterisk (*).

This tab enables you to enter the **Price**, **Cost** and **Special Price** information for this product. You can also add Tier Pricing, as described in "Tier Pricing," page 204.

- The **Special Price** field is used for discounting or promotions, as described in "Special Prices," page 202.
- The **Cost** field is only used in the backend. It can be used for generating margin and profit reports.
- The **Apply Map**, **Display Actual Price**, and **Manufacturer's Suggested Retail Price** fields are used for implementing the Minimum Advertised Price feature for this product. For more information, see "Minimum Advertised Price," page 205.

## Meta Information Tab

Click **Meta Info** on the left to display the **Meta Information** tab, as shown in Figure 97.

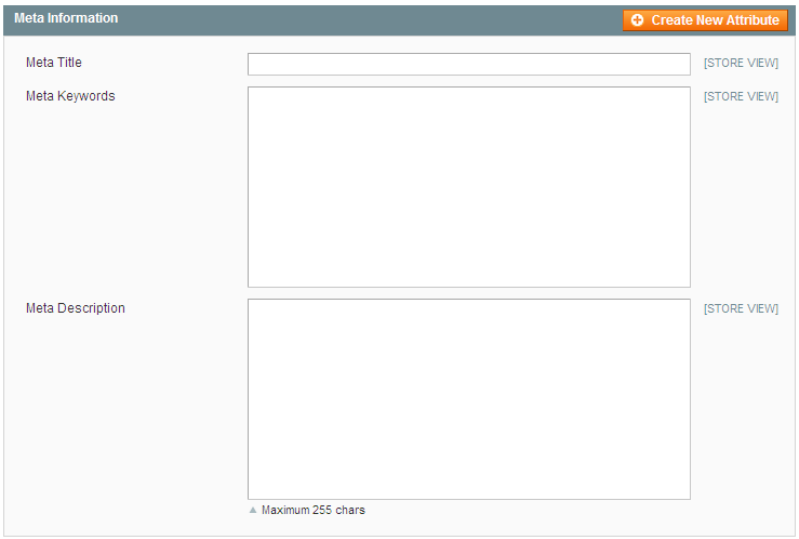



**Figure 97. Meta Information Tab**

4. Specify information that enables search engines to more easily find and index this product.

## Images Tab

Customers generally like to see what they are buying before they make a purchase. The **Images** tab enables you to upload pictures of your product.

1. Click the **Images** tab on the left to display the **Images** tab, as shown in Figure 98.

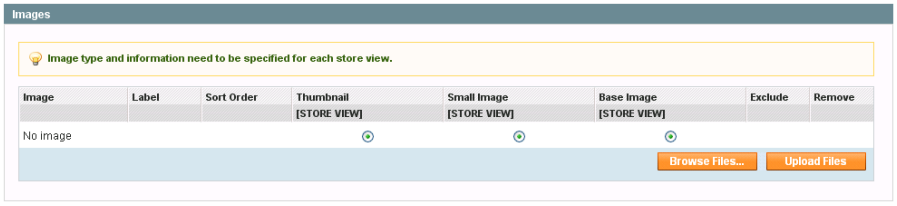



**Figure 98. Images Tab**

2. Specify the image to be displayed in the web store to represent this product. Use the **Browse** button to select the image file from your local file system.

   **Tip:** You can select more than one file in this window to upload multiple images at once.

3. After you have specified the image files of this product, click the **Upload Files** button. The **Images** tab shows uploaded the image files, as shown in Figure 99.

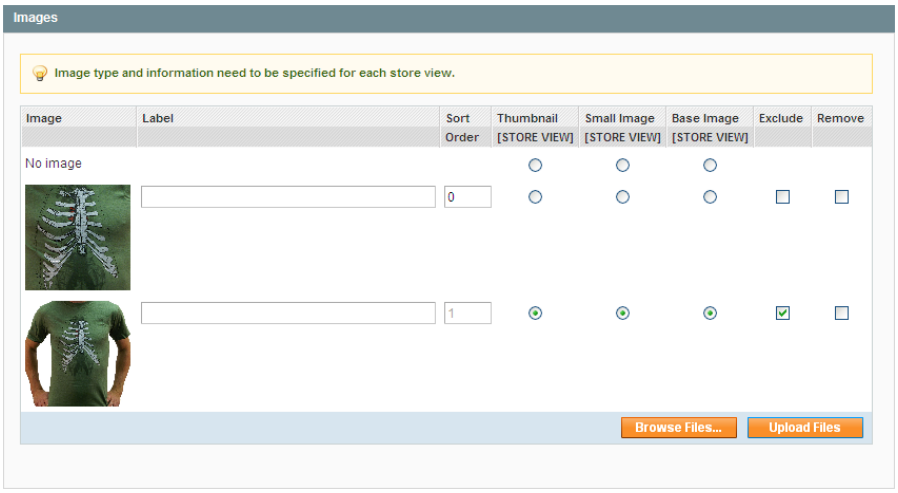



**Figure 99. Images Tab with Images Uploaded**

4. Select the appropriate options for each of the images, as follows:
   - **Label:** Alternate text for the image tag
   - **Sort Order:** The order in which the images are displayed in the Slideshow and MORE VIEWS gallery
   - **Thumbnail**: Used in shopping cart and related items
   - **Small Image**: Used in the Category listing, wishlist and so on
   - **Base Image:** Large product image (zoomed in)
   - **Exclude**: Excludes the image from the Slideshow and MORE VIEWS gallery
   - **Remove:** Deletes the image from the collection; if the **Remove** check box is selected, the image will be removed after you save the product

## Description Tab

Click **Description** on the left to open the **Description** tab, which enables you to create descriptions for the product (see Figure 100).

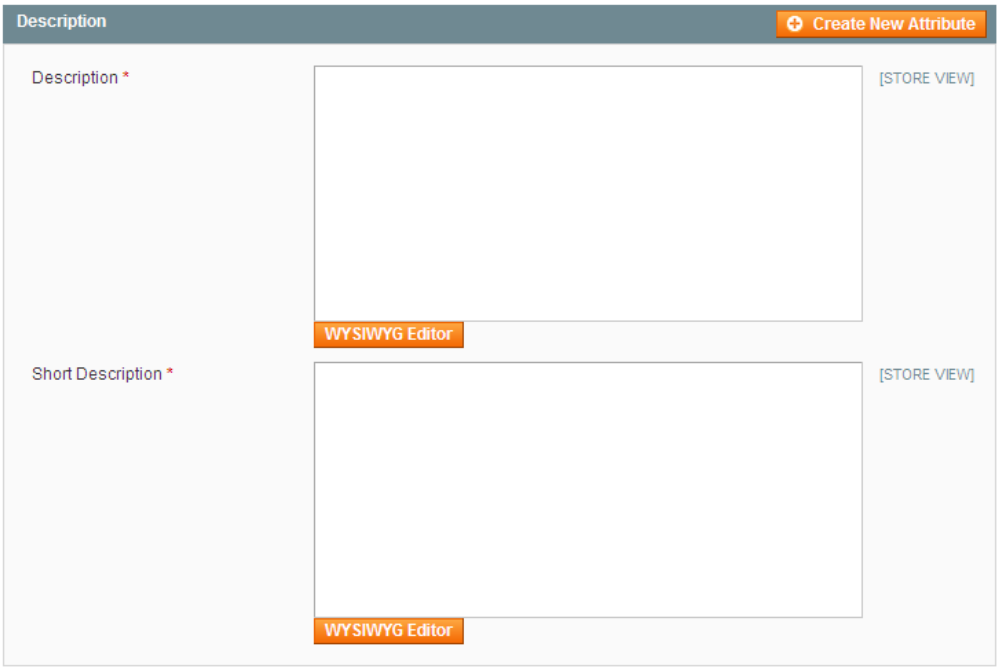



Figure 100. Description Tab

Both of the fields on this tab are mandatory. For both fields, you can use the WYSIWIG editor to format your descriptions.

- **Description:** The information that you enter in the **Description** field is shown in the product's page under the title **Product Description**.
- **Short Description:** The information that you enter in the **Short Description** field appears on the product's page under the title **Quick Overview**. This information is also shown when products are displayed in a list.

## Design Tab

The **Design** tab contains additional settings to control the appearance of this product's product page, as shown in Figure 101.

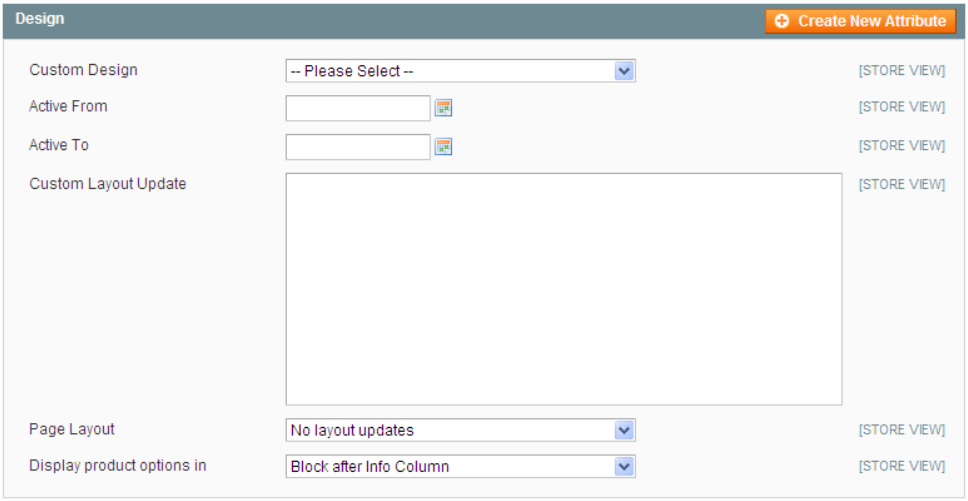



Figure 101. Design Tab

All of these settings are optional. For more information about custom designs and page layouts, see "Design and Content," page 173.

1. Select a custom design from the **Custom Design** drop-down list. Magento CE comes with several custom designs already defined, and you can modify these custom designs or create your own.
2. For the **Active From** and **Active To** fields, select the start and end dates for this custom design to be applied to this product. If you do not select a start date, the custom design is applied immediately. If you do not select an end date, the custom design is applied to this product until you manually deactivate it.
3. The **Custom Layout Update** is essentially a static block, with a few differences. Rather than HTML, the structure must be in XML format. The Update will appear at the bottom of the page, below the products, whereas a static block will appear above the products (if the static block is set to display with products). The Custom Layout Update will appear on the page only during the dates specified in the Active date range.
4. For **Page Layout**, select a layout from the drop-down list.
   - **No layout updates**: Uses the default settings that come with the Magento CE installation
   - **Empty**: Displays the category page without any objects, except for the content (products or static blocks only), category name, and view options (number to display per page, view as grid or list, and sort be options)
   - **1 column**: Displays the contents, category name and view options, as well as the header, footer, search field, and navigation bar
   - **Column on the left:** Adds the left column to the 1 column display, which by default includes the currency selection and layered navigation
   - **Column on the right:** Adds the right column to the 1 column display, which by default includes the shopping cart view, wishlist, compared products list, polls, and newsletter sign-up

- **3 columns:** Displays both the left and the right columns

5. For **Display Product Options In**, select a location for the product options to appear in the layout.

## Recurring Profile Tab

By default, the **Recurring Profile** tab only appears for simple and virtual products. However you can configure it to become available for other product types, by changing the **Apply To** option of the Enable Recurring Profile attribute. A recurring profile enables you to set and configure recurring payments on a product. These are most often used for subscriptions or products with installment payment plans. When a product like this is purchased from your store, the customer is redirected to a third-party payment system where a "recurring payment agreement" with the store is authorized by the customer. Currently, creating recurring profiles is available only for the PayPal Express Checkout payment method.

To enable a recurring profile for this product, select **Yes** for **Enable Recurring Profile**. Additional options become visible, as shown in Figure 102.

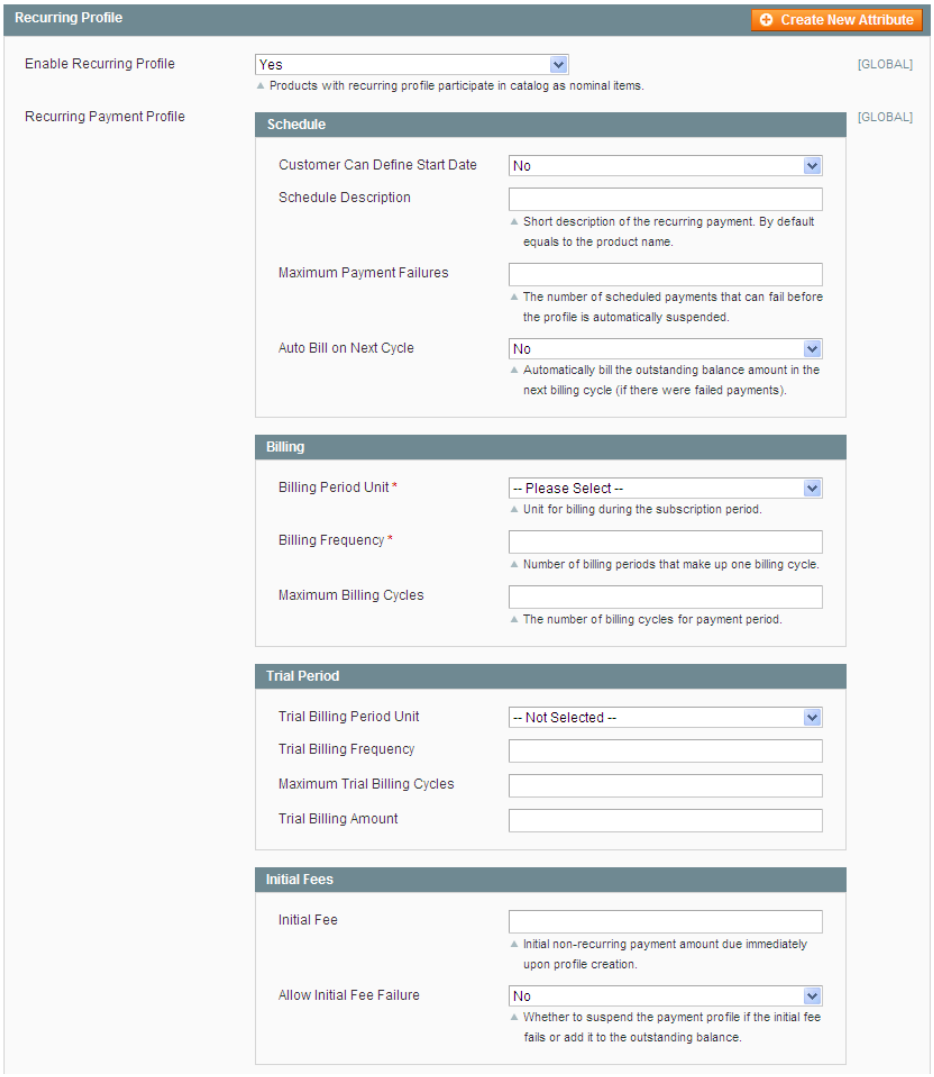

Recurring Profile
Create New Attribute
Enable Recurring Profile
Yes
[GLOBAL]
Products with recurring profile participate in catalog as nominal items.
Recurring Payment Profile
[GLOBAL]
Schedule
Customer Can Define Start Date
No
Schedule Description
Short description of the recurring payment. By default equals to the product name.
Maximum Payment Failures
The number of scheduled payments that can fail before the profile is automatically suspended.
Auto Bill on Next Cycle
No
Automatically bill the outstanding balance amount in the next billing cycle (if there were failed payments).
Billing
Billing Period Unit *
-- Please Select --
Unit for billing during the subscription period.
Billing Frequency *
Number of billing periods that make up one billing cycle.
Maximum Billing Cycles
The number of billing cycles for payment period.
Trial Period
Trial Billing Period Unit
-- Not Selected --
Trial Billing Frequency
Maximum Trial Billing Cycles
Trial Billing Amount
Initial Fees
Initial Fee
Initial non-recurring payment amount due immediately upon profile creation.
Allow Initial Fee Failure
No
Whether to suspend the payment profile if the initial fee fails or add it to the outstanding balance.

**Figure 102. Recurring Profile Tab**

Most of the options on this tab are self-explanatory. For additional details on how recurring profiles work, see the http://www.magentocommerce.com/knowledge-base/entry/working-with-recurring-profiles/ article in the Magento Knowledge Base.

**Note**: Creating a recurring profile for a product does not create subsequent orders in the Magento Admin Panel.

## Gift Options Tab

The **Gift Options** tab contains one option. The **Allow Gift Message** option determines whether customers are able to add a gift message to this particular product during checkout.

The default value of this setting is controlled by a Sales configuration setting (**System > Configuration > Sales >Gift Options**). To change this option, clear the **Use Config Settings** check box.

## Inventory Tab

The **Inventory** tab enables you to control various aspects of inventory management for this product.

Many of the settings on this tab are controlled by the Inventory configuration settings (**System > Configuration > Inventory**). To override these configuration settings for this product, clear the appropriate **Use Config Settings** check box.

1. Select the **Inventory** option in the left panel to display the **Inventory** tab, as shown in Figure 103.

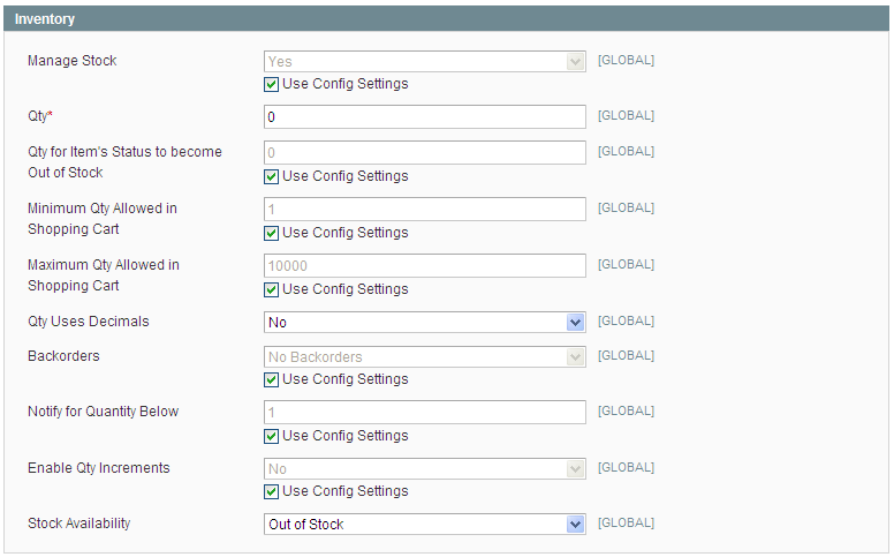



**Figure 103. Inventory Tab**

2. In the **Manage Stock** field, select **Yes** to specify that all inventory options are available for this single product, or select **No** to specify that you do not want to manage product inventory (in this case, the product is permanently available in the store to your customers).
3. In the **Qty** field, specify how many items of this product you have in stock.
4. In the **Qty for Item's Status to become Out of Stock** field specifies that if stock quantity falls below this level, then the product becomes **Out of Stock**.
5. The **Minimum** / **Maximum Qty Allowed in Shopping Cart** fields enable you to limit availability to products that have great prices to retailers, so that they are not sold to wholesale customers.
6. In the **Qty Uses Decimals** field, select **Yes** to specify that customers can enter decimal quantities for this product, as opposed to integers. This is suitable for a product sold by the weight, volume or length. For example: 2.35 pounds of concrete or 3.75 feet of carpeting.

7. The **Backorders** field enables your customers to place an order for a product that has an in-stock quantity of less than **0**. This option also enables you to notify your customers that even though there are no items of a product currently available, they can still place an order. You can do this by selecting the **Allow Qty Below 0** option and the **Notify Customer** option. You can also enable this option without notifying customers by only selecting the **Allow Qty below 0** option.
8. The **Enable Qty Increments** field enables you to choose whether this product is sold in quantities other than 1 (for example wine that is sold in multiples of 6 bottles). If you select **Yes** for this option, the **Qty Increments** field becomes visible, enabling you to specify the quantity increment for this product.
9. In the **Stock Availability** field, select the **In Stock** option if this product is in stock, or select **Out of Stock** otherwise.

## Websites Tab

The **Websites** tab enables you to choose which websites, stores, and store views this product is available on. Use the check boxes to make your selections. To set up websites, stores, and store views, see "Setting Up Your Store Hierarchy," page 127.

1. Select the **Websites** option in the left panel to display the **Websites** tab, as shown in Figure 104.

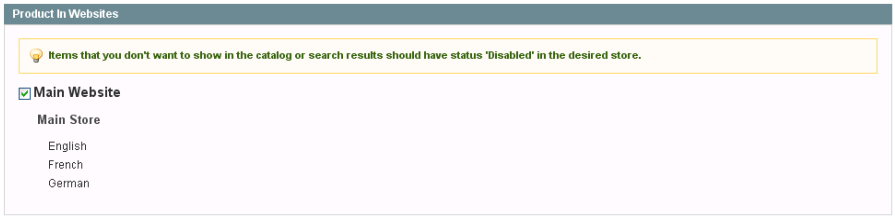

Product In Websites
Items that you don't want to show in the catalog or search results should have status 'Disabled' in the desired store.
Main Website
Main Store
English
French
German

**Figure 104. Websites Tab**

2. If your store has more than one website, store or store view, you must assign the product to the appropriate website in order to make it available in this website.

**Note:** Sample Data contains three store views. If you want to create a product in the Sample Data environment, you must select the **Main Website** option when creating a product.

## Categories Tab

The **Categories** tab enables you to assign this product to one or more categories.

1. Select the **Categories** option in the left panel to display the **Categories** tab, as shown in Figure 105.

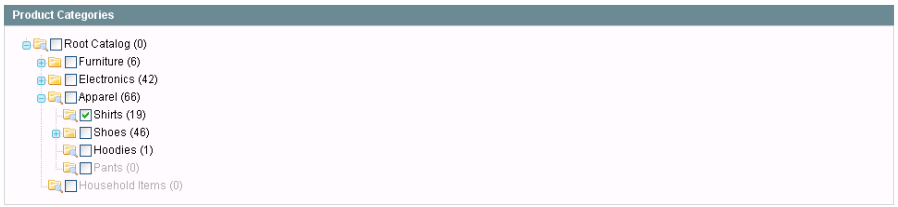



**Figure 105. Categories Tab**

2. Specify the categories to which this product belongs by selecting the appropriate check boxes.

**Note:** You can assign a product to more than one category.

**Note:** You can also assign products to a category while editing the category.

## Related Products, Cross-Sell, and Up-Sell Tabs

Each of these pages is similar and enables you to configure relationships between products. The interface in Figure 106 appears in each of these pages:

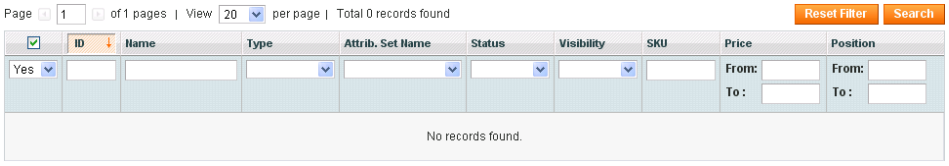



**Figure 106. Product Relationship Interface**

- To display all the products in the list, click the **Reset Filter** button.
- Select the relevant checkboxes to assign products. You can use any of the filters available to make it easier to search for the products that you want.

For more information about these pages, see "Promotions," page 185.

## Product Alerts Tab

This page is only available when alerts are enabled (**System > Configuration** > **Catalog**.

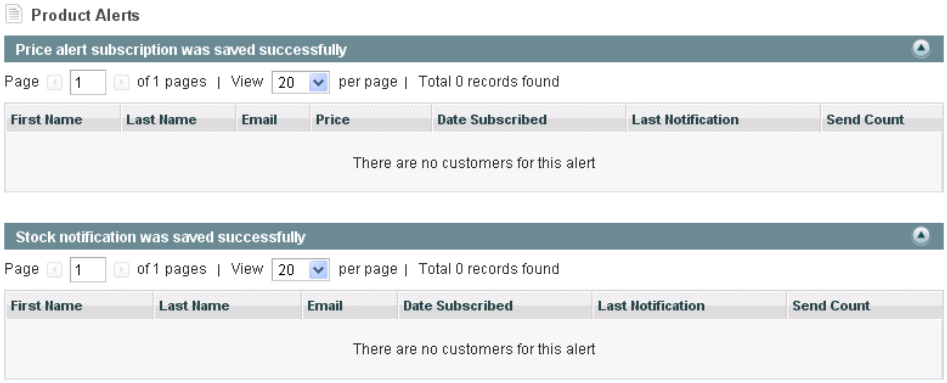

Product Alerts
Price alert subscription was saved successfully
Page 1 of 1 pages | View 20 per page | Total 0 records found
First Name
Last Name
Email
Price
Date Subscribed
Last Notification
Send Count
There are no customers for this alert
Stock notification was saved successfully
Page 1 of 1 pages | View 20 per page | Total 0 records found
First Name
Last Name
Email
Date Subscribed
Last Notification
Send Count
There are no customers for this alert

**Figure 107. Product Alerts Tab**

This page displays a list of the customers that have subscribed to each type of alert for this product, and the dates on which they were notified about changes.

## Product Reviews Tab

This tab provides a list of reviews posted by customers about a product that is being edited (the tab is not available for new product records for which there are no reviews). You can use the **Edit** button that appears in each review row to approve, edit or remove the review.

**Note:** The **Pending Reviews RSS** link enables you to receive notifications of all pending reviews and enables you to first approve them before they are shown on the site.

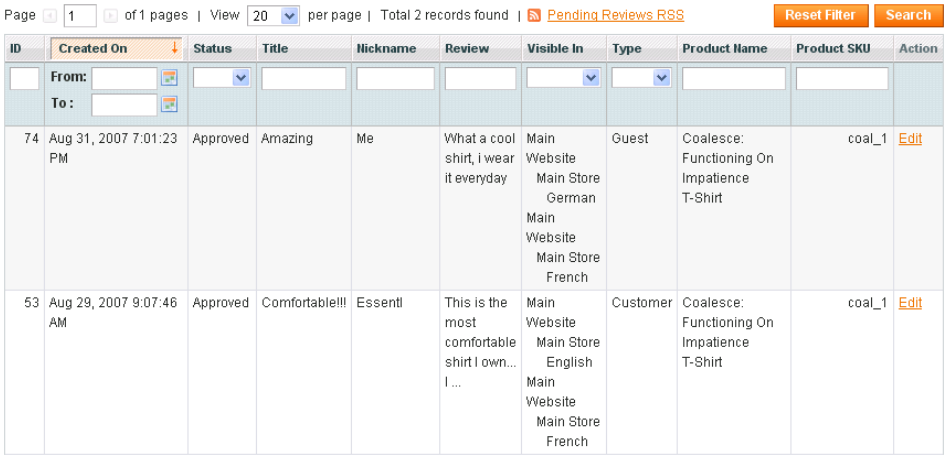



**Figure 108. Product Reviews Tab**

## Product Tags Tab

This tab displays the tags that customers have assigned to a product, and how many times each tag was used. This tab is not available in new product records for which no tags have been assigned.

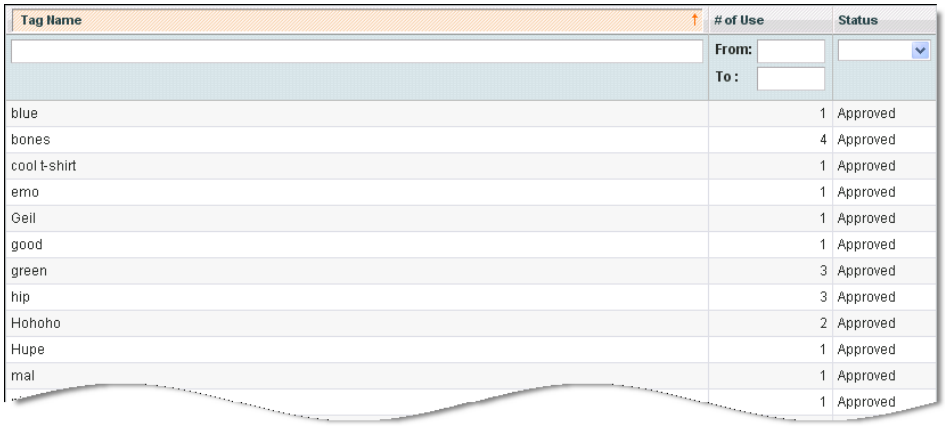
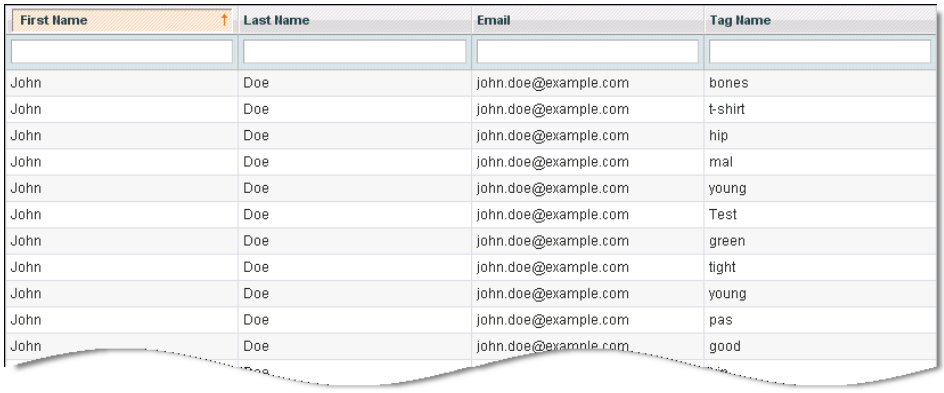



**Figure 109. Product Tags Tab**

**Note:** You can click on a tag row to edit it or Approve, Reject, Disable or Delete it.

## Customers Tagged Product Tab

This page enables you to see which customers have tagged specific products.



| First Name | Last Name | Email | Tag Name |
|---|---|---|---|
| John | Doe | john.doe@example.com | bones |
| John | Doe | john.doe@example.com | t-shirt |
| John | Doe | john.doe@example.com | hip |
| John | Doe | john.doe@example.com | mal |
| John | Doe | john.doe@example.com | young |
| John | Doe | john.doe@example.com | Test |
| John | Doe | john.doe@example.com | green |
| John | Doe | john.doe@example.com | tight |
| John | Doe | john.doe@example.com | young |
| John | Doe | john.doe@example.com | pas |
| John | Doe | john.doe@example.com | good |

**Figure 110. Customers Tagged Product Tab**

**Note:** You can click on a tag row to edit it or Approve, Reject, Disable or Delete it.

## Custom Group Configuration Pages

Additional configuration pages may appear depending upon the groups that you have created using the Attribute Sets tool. See "Creating Attribute Sets," page 92, for more information about attribute sets. An example custom group T-Shirts attribute is shown in Figure 111.

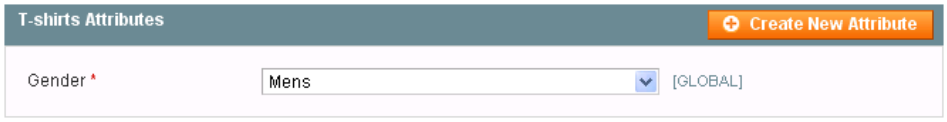



**Figure 111. Custom Attribute**

Fill in the attributes that appear in this page according to the definitions that are specified in the attribute set. Some of these attributes may be mandatory and each may be one of a variety of types according to the definitions of the attribute set.

## Custom Options Tab

This page enables you to easily create product variants or products that can accept customer input, such as custom imprints or gifts. See "Creating Variations of a Product," page 121, for more information on this topic.

## Product Type Dependent Configuration Pages

Depending upon the product type, additional configuration tabs may be available. The following provides a quick review of these types of pages.

### Downloadable Products: Downloadable Information Tab

The **Downloadable Information** tab enables you to specify options for a downloadable product.

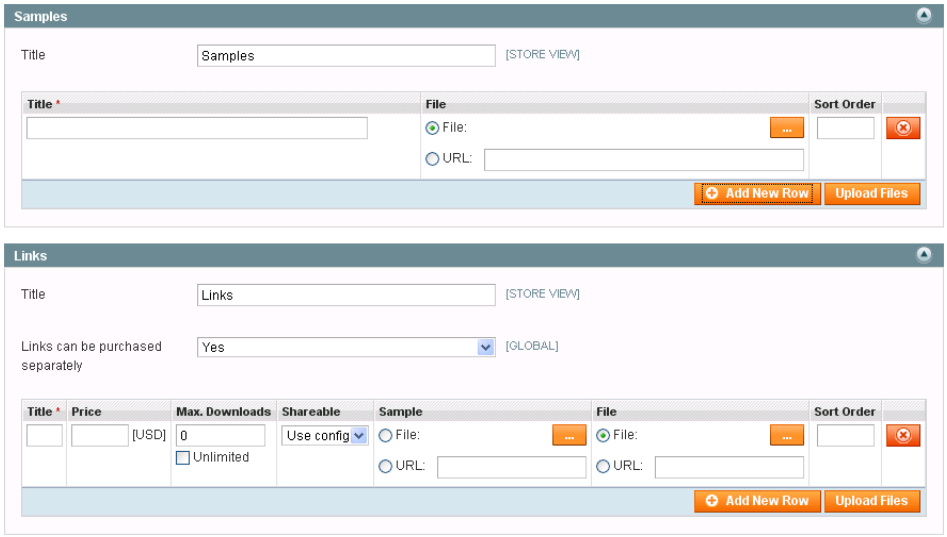



**Figure 112. Downloadable Information Tab**

This page contains two sections:

- The **Samples** section enables you to display a sample of the downloadable product on the product's information page. For example, this can be a short sample of a music file, a few pages of an eBook, or a trial version of a software application. You can provide as many samples as you require by clicking the **Add New Row** button and filling out the fields. You can add files using either of two methods:
  - Selecting the **File** option, clicking the Browse button (**...**) and then clicking the **Upload Files** button. This will upload the file from your local computer to the server.
  - Selecting the **URL** option, specifying the link to a file that is already on a server in a different location, and clicking the **Upload Files** button.

  Samples that you put in the Samples section appear in the store as shown in Figure 113.

Figure 113. Downloadable Product Sample

- The **Links** section contains the actual products that can be purchased, along with possible samples for them.
  - The **Links can be purchased separately** option controls whether each of the downloadable products can be purchased by itself or not. This feature enables, for example, the tracks of a music CD product to be purchased separately. If you set this option to **Yes**, then you must input the price for each of the downloadable items.
  - Each of the items also has two options controlling its behavior. The **Max. Downloads** option controls how many times after purchase a product can be downloaded by the customer. The **Shareable** option controls whether after each purchase of the product, the downloadable item is available for download without logging in, or if it requires logging in. If the **Shareable** option is set to **Yes**, then customers can click links in the Order Confirmation email that they receive in order to get the product. However, this setting also enables anyone who gets this link to download the product. Setting this option to **Yes** is the only way to enable Guests to check out (or to enable a comparable quick checkout method, such as PayPal Express or Google Checkout) to download the product. There are configuration settings that must be selected to match your store.

The uploading process is similar to the uploading of the samples, as described above, with the exception of providing an option to tie in sample files for each downloadable product. This feature can be used to provide customers with a short sample of each track of a music CD, for example.

Figure 114shows a product in a store with three links and samples for each of them, for which the setting **Links can be purchased separately** was set to **Yes**.

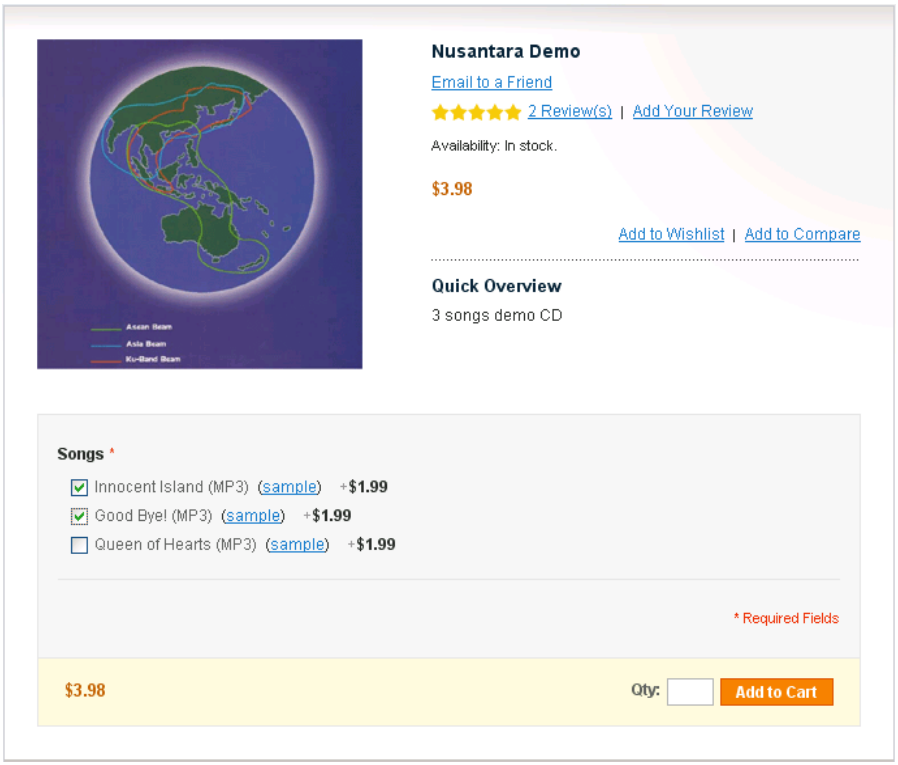



**Figure 114. Downloadable Product Links and Samples**

## Bundle Product: Bundle Items Tab

An example of a bundled product is the Build Your Own Computer offering found in the demo store, as shown in Figure 115.

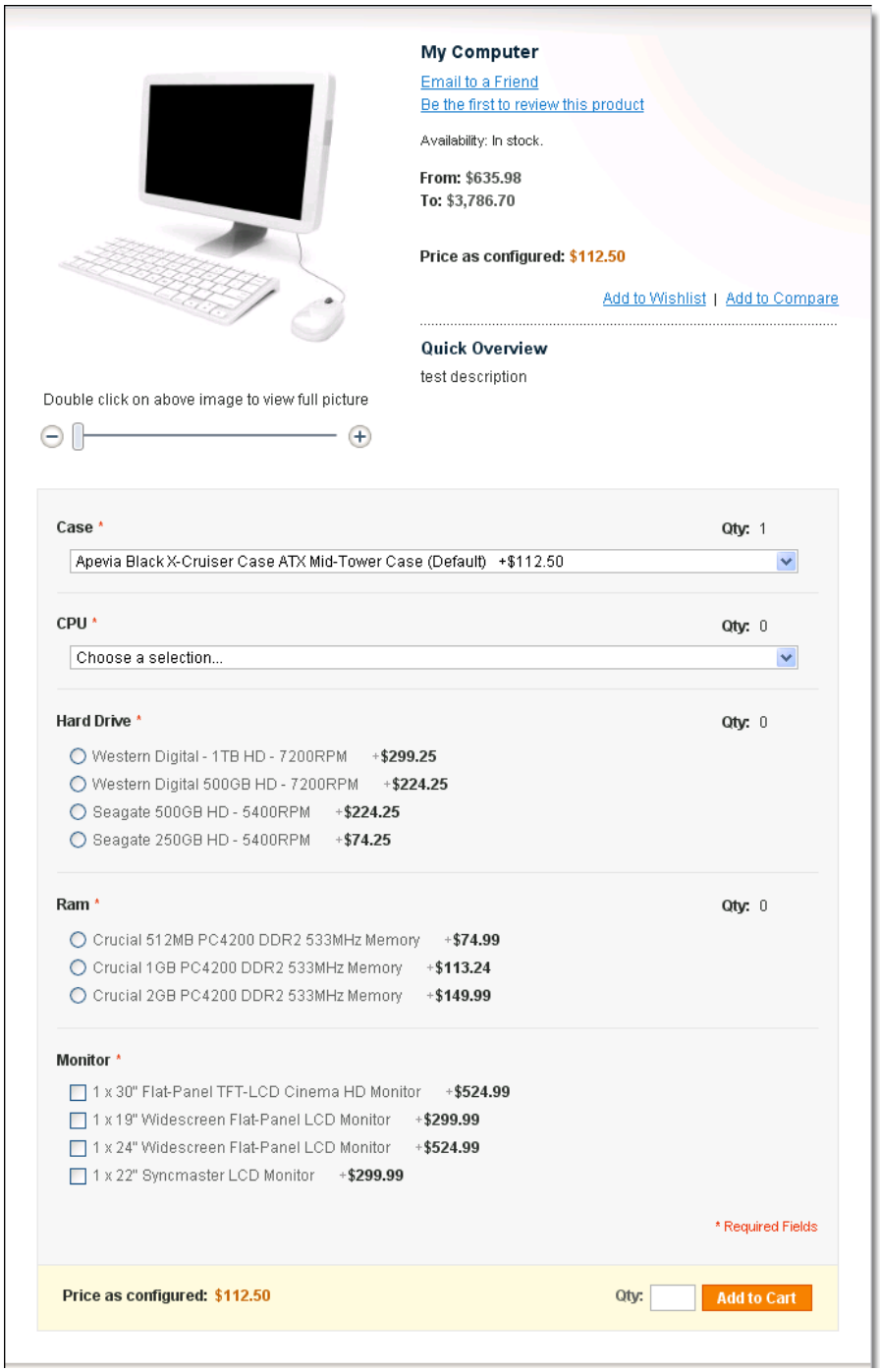

My Computer
Email to a Friend
Be the first to review this product
Availability: In stock.
From: $635.98
To: $3,786.70
Price as configured: $112.50
Add to Wishlist | Add to Compare
Quick Overview
test description
Double click on above image to view full picture
Case *
Qty: 1
Apevia Black X-Cruiser Case ATX Mid-Tower Case (Default) +$112.50
CPU *
Qty: 0
Choose a selection...
Hard Drive *
Qty: 0
Western Digital - 1TB HD - 7200RPM +$299.25
Western Digital 500GB HD - 7200RPM +$224.25
Seagate 500GB HD - 5400RPM +$224.25
Seagate 250GB HD - 5400RPM +$74.25
Ram *
Qty: 0
Crucial 512MB PC4200 DDR2 533MHz Memory +$74.99
Crucial 1GB PC4200 DDR2 533MHz Memory +$113.24
Crucial 2GB PC4200 DDR2 533MHz Memory +$149.99
Monitor *
1 x 30" Flat-Panel TFT-LCD Cinema HD Monitor +$524.99
1 x 19" Widescreen Flat-Panel LCD Monitor +$299.99
1 x 24" Widescreen Flat-Panel LCD Monitor +$524.99
1 x 22" Syncmaster LCD Monitor +$299.99
* Required Fields
Price as configured: $112.50
Qty:
Add to Cart

Figure 115. Bundle Product

In Bundled product types, there are differences in the **General** and **Prices** pages, as follows:

- **SKU Fixed or Dynamic** (**General** tab): Specifies whether the entire product is assigned an SKU based on its components, or is the SKU fixed for the bundle.

- **Weight Fixed or Dynamic** (**General** tab)**:** Specifies whether the entire product's weight is based on the weight of its individual components, or is the weight fixed for the entire bundle.
- **Price Fixed or Dynamic** (**Price** tab): Specifies whether the price of the product us based on the price of its individual component, or is the price fixed for the entire bundle.
- **Price View** (**Price** tab): Specifies whether the product's price is shown as a range, from the least expensive component to the most expensive (**Price Range**), or is only the least expensive shown (**As Low As**).

The **Bundle Items** tab contains the following settings:

- **Ship Bundle Items**: Specifies whether individual components are shipped separately or whether the entire product is shipped.
- **Bundle Items:** Bundled Items appear in the store as a list of available options. You can add a new option using the **Add New Option** button. For each option you can configure its title, input type (single and multiple selection fields are available), whether the field is mandatory (for example: it can be **True** for a computer processor and **False** for an additional battery of a laptop computer), and its position on the page.

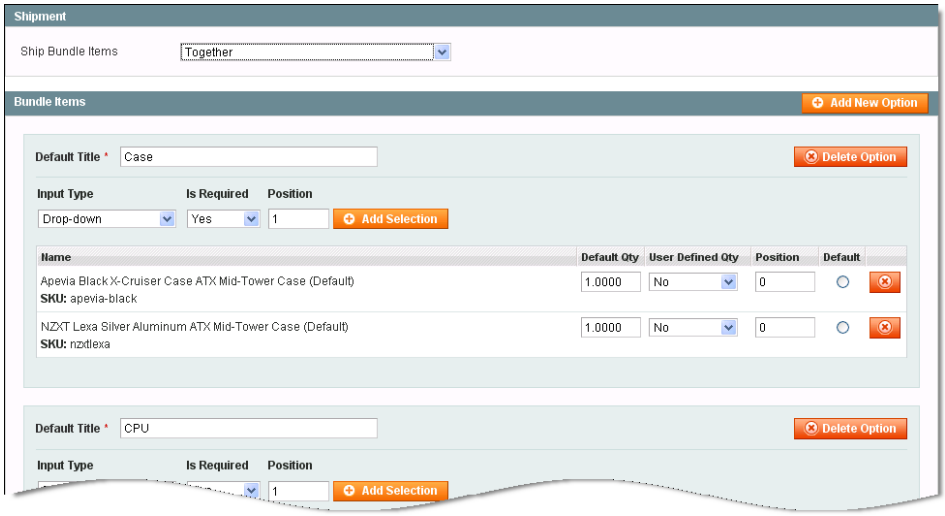



Figure 116. Bundle Items Tab

After you add options, you can specify individual values for each option. Click the **Add Selection** button to open a selection area, as shown in Figure 117.

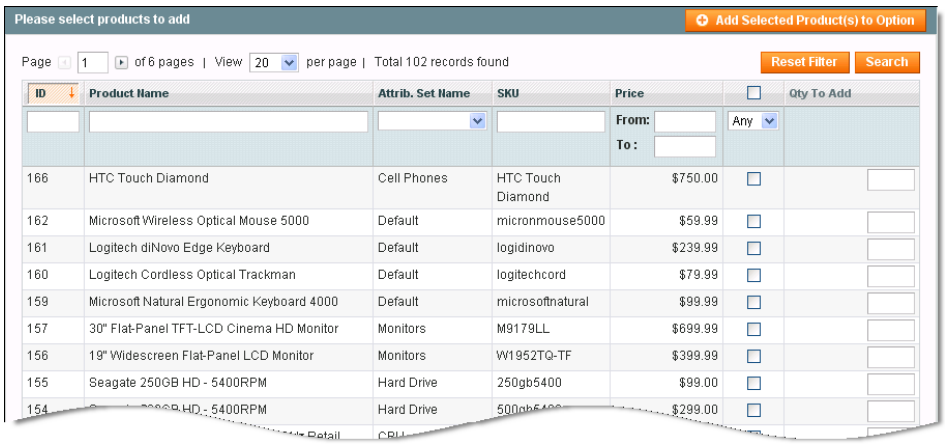

Please select products to add
Add Selected Product(s) to Option
Page 1 of 6 pages | View 20 per page | Total 102 records found
Reset Filter
Search
ID
Product Name
Attrib. Set Name
SKU
Price
From:
To :
Any
Qty To Add
166 HTC Touch Diamond Cell Phones HTC Touch Diamond $750.00
162 Microsoft Wireless Optical Mouse 5000 Default micronmouse5000 $59.99
161 Logitech diNovo Edge Keyboard Default logidinovo $239.99
160 Logitech Cordless Optical Trackman Default logitechcord $79.99
159 Microsoft Natural Ergonomic Keyboard 4000 Default microsoftnatural $99.99
157 30" Flat-Panel TFT-LCD Cinema HD Monitor Monitors M9179LL $699.99
156 19" Widescreen Flat-Panel LCD Monitor Monitors W1952TQ-TF $399.99
155 Seagate 250GB HD - 5400RPM Hard Drive 250gb5400 $99.00
154 Hard Drive $299.00

**Figure 117. Adding Products to a Bundle**

You can select any product that you want using the check boxes. Click the **Add Selected Product(s) to Option** button to confirm the assignment. For each selection, you can then define the following options:

- **Default Qty:** Specifies the default quantity shown in the product view page
- **User Defined Qty:** When set to **Yes**, this option enables customers to enter a quantity for a given selection
- **Position:** Specifies the Orders of a selection
- **Default:** Specifies the predefined value

## Grouped Product: Associated Products Tab

A grouped product enables you to purchase each of the items separately.

In the store, a grouped product appears as shown in Figure 118.

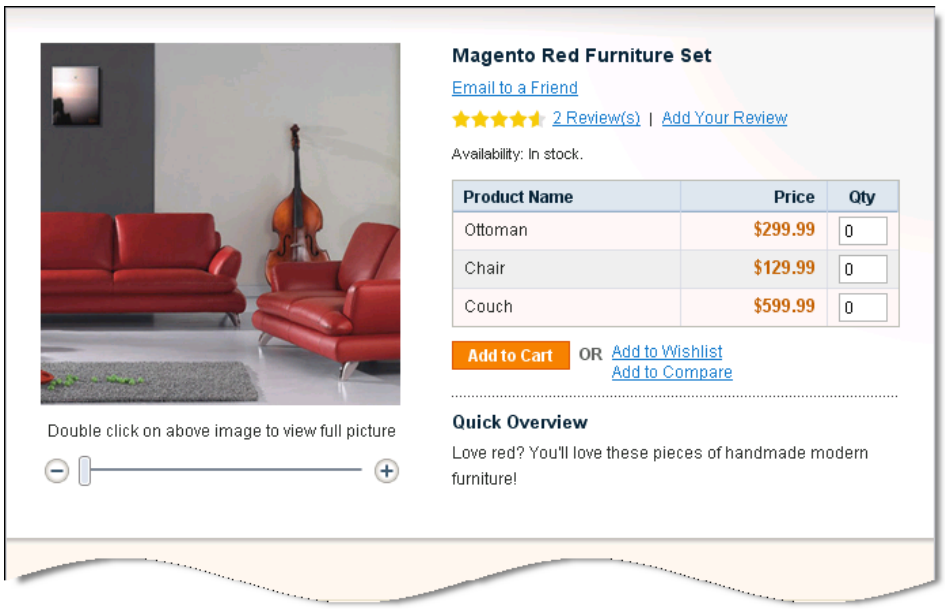



Figure 118. Grouped Product

When creating a Grouped Product, the Associated Products page enables you to specify which products are included in a group, as well as the default quantity for each and their position (order) on the page.

| | ID | Name | SKU | Price | Default Qty | Position |
|---|---|---|---|---|---|---|
| | Yes | | | From: To: | From: To: | From: To: |
| ☑ | 53 | Couch | 1113 | $599.99 | | |
| ☑ | 52 | Chair | 1112 | $129.99 | | |
| ☑ | 51 | Ottoman | 1111 | $299.99 | | |

Figure 119. Associated Products in a Grouped Product

**Note:** There is no global price for grouped products. Their price is controlled only by the individual elements that you purchase.

## Configurable Product: Associated Products Tab

Configurable products must be associated with simple products using attributes that a customer can select from a configurable product page. This means that when a shirt is offered in three sizes, then three simple products must be assigned to the configurable product, one for each size.

The configurable product appears in the store with a section that provides customers with options, such as the **Size** option shown in Figure 120.

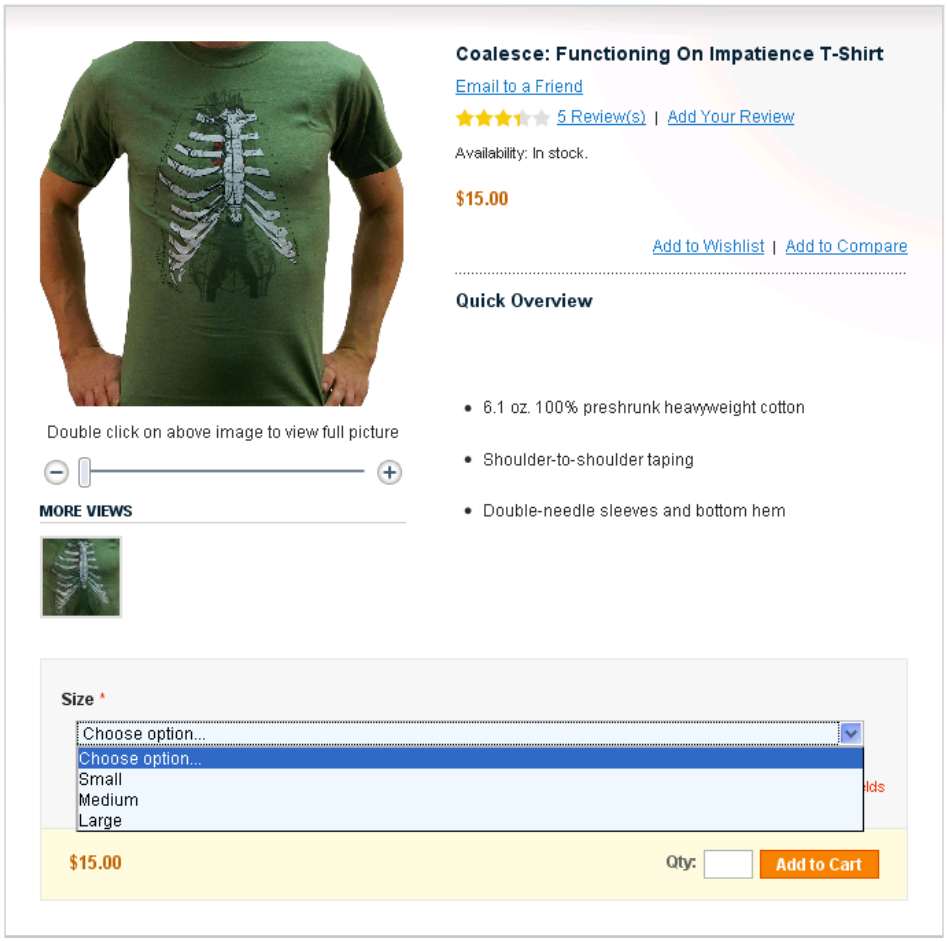



Figure 120. Configurable Product

This is the most complex configuration page and it is described below it in three stages.

## Select Configurable Attributes

This section enables you to select the product attributes that can be configured. The only attributes that are available on this tab are those that have a scope of **Global**, an input type of **Dropdown**, and the **Use to create configurable product** option set to **Yes**.

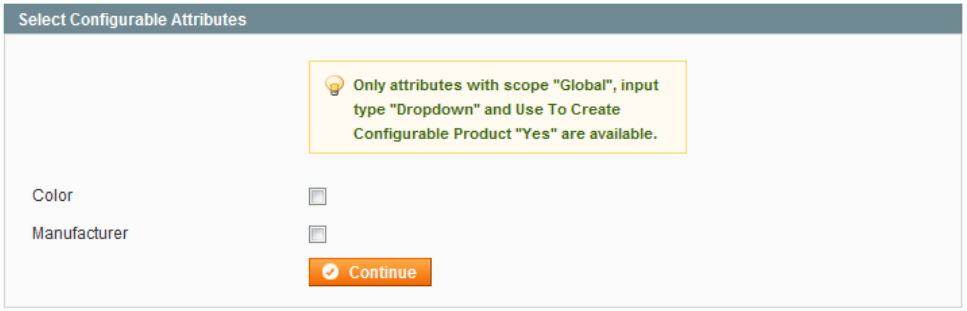

Select Configurable Attributes
Only attributes with scope "Global", input type "Dropdown" and Use To Create Configurable Product "Yes" are available.
Color
Manufacturer
Continue

Figure 121. Select Configurable Attributes

Use the check boxes to select one or more desired attribute, and then click **Continue**.

## Create Simple Associated Product

This section enables you to create simple products along with the configurable product.

Figure 122. Create Simple Associated Product

Click the **Create Empty** button to open a popup window with a regular product creation page, but which has a preselected product type, **Simple Product**, and an attribute set that is the same as the configurable product.

The **Copy from Configurable** button works in a very similar manner to the above, but it pre-fills many of the fields with information from the selected configurable product, as shown in Figure 123.

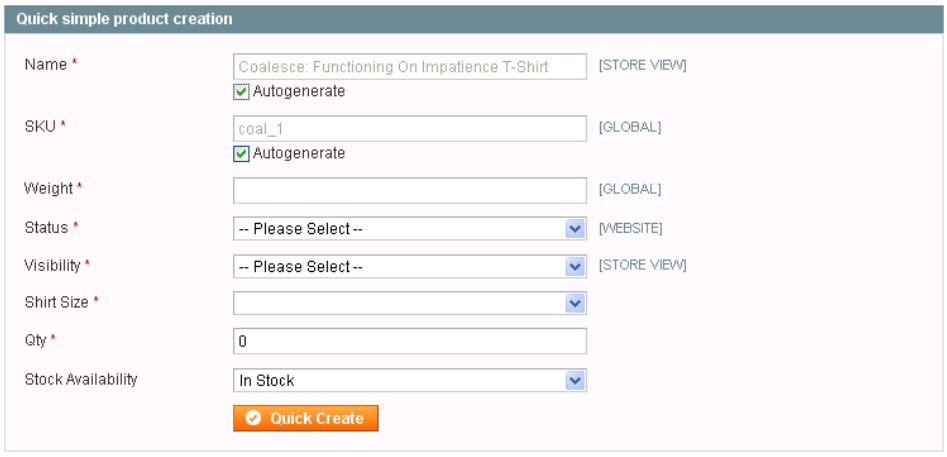



Figure 123. Quick Simple Product Creation

This area enables you to quickly create simple products without filling in all the information. Fill in the required fields and click the **Quick Create** button to create this product. The **Auto generate** option enables Magento CE to select the **Name** and **SKU** based on the attributes.

## Super Product Attributes Configuration

This section enables you to specify the attribute name that appears in the store for selection and the price for each of the options. Two price options are provided: **Fixed** or **Percentage**.

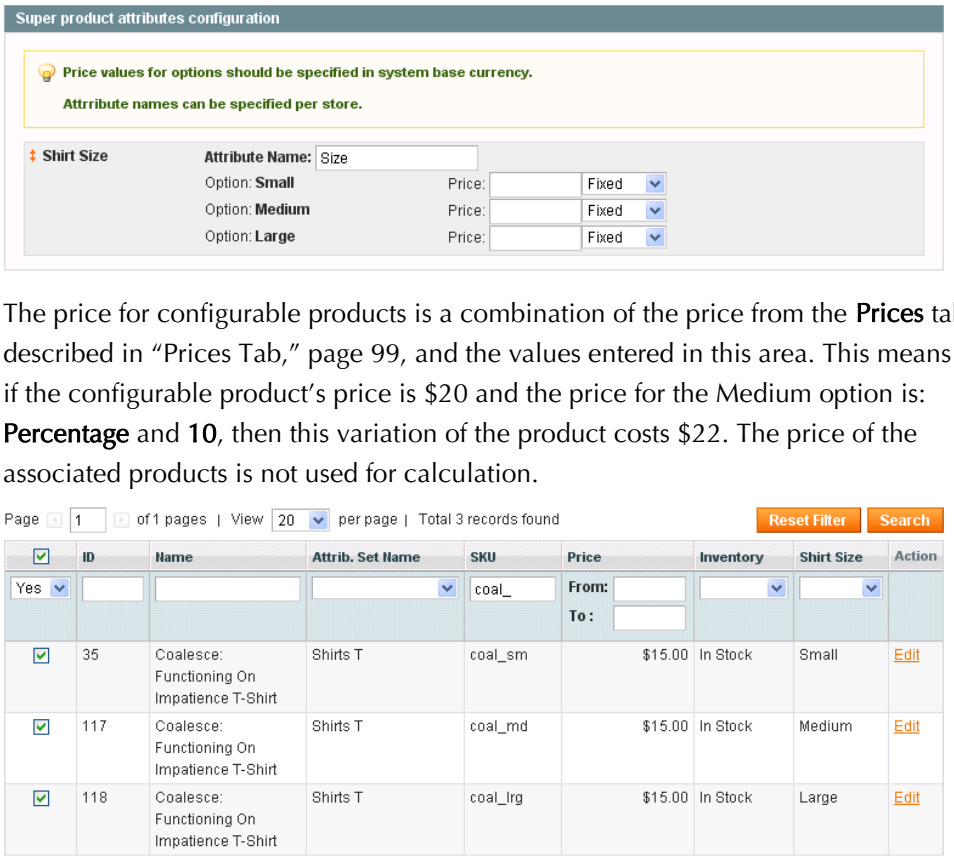

Super product attributes configuration
Price values for options should be specified in system base currency.
Attrribute names can be specified per store.
Shirt Size
Attribute Name: Size
Option: Small Price: Fixed
Option: Medium Price: Fixed
Option: Large Price: Fixed
Page 1 of 1 pages | View 20 per page | Total 3 records found
Reset Filter
Search
ID
Name
Attrib. Set Name
SKU
Price
Inventory
Shirt Size
Action
Yes
coal_
From:
To :
35 Coalesce: Functioning On Impatience T-Shirt Shirts T coal_sm $15.00 In Stock Small Edit
117 Coalesce: Functioning On Impatience T-Shirt Shirts T coal_md $15.00 In Stock Medium Edit
118 Coalesce: Functioning On Impatience T-Shirt Shirts T coal_lrg $15.00 In Stock Large Edit

Figure 124. Selecting Associated Products

## Completing the Product Wizard

Click the **Save** or **Save and Continue Editing** button in the top right corner of the page. If you choose the latter, after saving the product you are redirected back to its page.

### To edit an existing product:

1. From the **Catalog** menu, select the **Manage Products** option to display a list of products, as shown in Figure 125.

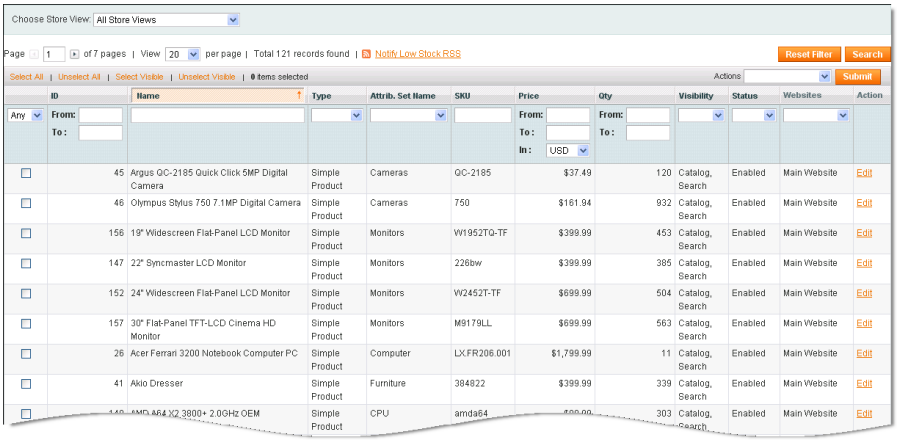

Choose Store View: All Store Views
Page 1 of 7 pages | View 20 per page | Total 121 records found | Notify Low Stock RSS
Reset Filter
Search
Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected
Actions
Submit
ID
Name
Type
Attrib. Set Name
SKU
Price
Qty
Visibility
Status
Websites
Action
45 Argus QC-2185 Quick Click 5MP Digital Camera Simple Product Cameras QC-2185 $37.49 120 Catalog, Search Enabled Main Website Edit
46 Olympus Stylus 750 7.1MP Digital Camera Simple Product Cameras 750 $161.94 932 Catalog, Search Enabled Main Website Edit
156 19" Widescreen Flat-Panel LCD Monitor Simple Product Monitors W1952TQ-TF $399.99 453 Catalog, Search Enabled Main Website Edit
147 22" Syncmaster LCD Monitor Simple Product Monitors 226bw $399.99 385 Catalog, Search Enabled Main Website Edit
152 24" Widescreen Flat-Panel LCD Monitor Simple Product Monitors W2452T-TF $699.99 504 Catalog, Search Enabled Main Website Edit
157 30" Flat-Panel TFT-LCD Cinema HD Monitor Simple Product Monitors M9179LL $699.99 563 Catalog, Search Enabled Main Website Edit
26 Acer Ferrari 3200 Notebook Computer PC Simple Product Computer LX.FR206.001 $1,799.99 11 Catalog, Search Enabled Main Website Edit
41 Akio Dresser Simple Product Furniture 384822 $399.99 339 Catalog, Search Enabled Main Website Edit
AMD A64 X2 3800+ 2.0GHz OEM Simple Product CPU amda64 303 Catalog, Search Enabled Main Website Edit

**Figure 125. Product List**

2. Click the **Edit** link on the right side of the row of the relevant product.

## Mass-Changing Products

Magento CE provides various features that enable changes to be made on multiple products or their properties. On the product list, mark products using the selection check boxes. Then select one of the actions from the **Actions** dropdown field and click the **Submit** button:

- **Delete:** Deletes the selected products from the store.
- **Change Status:** Disables or enables multiple products at once.
- **Update Attributes:** Updates the attributes of multiple products. When you click the **Submit** button, a new page opens containing a list of all attributes for all selected products. Select the **Change** check box for any attribute that you want to change, then specify the new attribute values. Click **Save** to confirm the changes.

**Note**: You can use the **Duplicate Product** feature to create separate products without having to enter every value each time. To use it, click the **Duplicate** button on the product page of an existing product.

# Creating Variations of a Product

This section describes how to create variations of a product by adding input controls (input options) to a product's page. An example of the variation of a product is the same product with different colors or sizes. In this case a customized field must be added by you to enable the customer to select the required color or size.

**Tip:** If you want to track the quantity that is sold of each variant of the product, you must create a separate product for each variant of the product and group them in the product of type Configurable, and not use the variations options described here.

## To create variations of a product:

1. From the **Catalog** menu, select the **Manage Products** option to display a list of products.
2. Click the **Add Product** button to create a new product or click the **Edit** link to the right of the relevant product to open the edit page.
3. Select the **Custom Options** tab.
4. Click the **Add New Options** button on the top right of this page to display the controls shown in Figure 126.

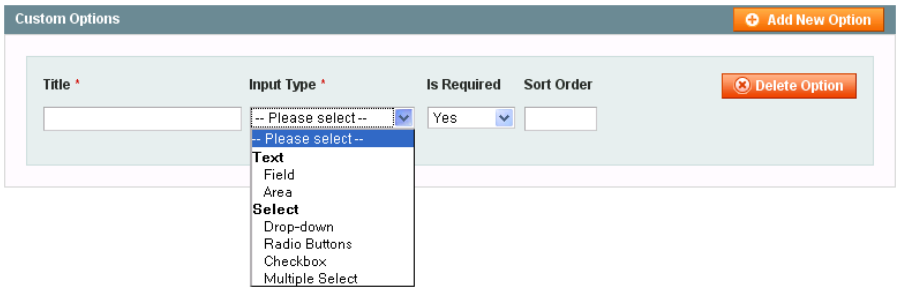



Figure 126. Creating Custom Options

5. In the **Title** field, specify a name for this new property, such as the name **Size**.
6. In the **Input Type** field, select the type of input that can be given in this field, such as text or dropdown menu, as shown above.
7. In the **Is Required** field, select **Yes** to indicate that this is a mandatory field, meaning that a customer must select an option in this field in order to purchase this specific product.
8. If there is more than one option, then specify the order in which this option appears in the **Sort Order** field. A value of **1** indicates that it appears first.
9. Click the **Add New Row** button to display the row shown in Figure 127, in which you can define the new variation of this product. For example, the product in a certain size and its corresponding price.

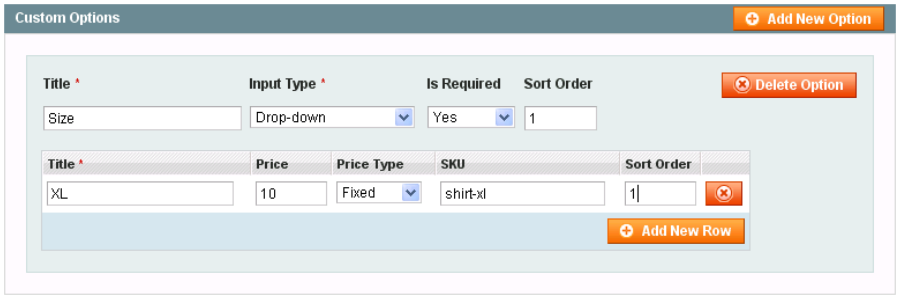



Figure 127. Creating a Product Variation

10. In the **Title** field, specify the name of this variation of the product, such as **Size XL**.
11. All the prices in these rows are relative to the price of this product as defined in the **Prices** page of the product wizard described on page 99. In the **Price Type** field, select one of the following options:

- **Fixed:** To specify that the price of this variation of the product differs from the price of the base product by a fixed monetary amount, such as **$1**.
- **Percentage:** To specify that the price of this variation of the product differs from the price of the base product by a percentage, such as **10%**.

12. In the **Price** field, specify the difference between the price of this variation of the product and the price of the base product. Specify a fixed amount or a percentage according to the value that you entered in the **Price Type** field. You can also enter negative values.
13. In the **SKU** field, specify the SKU for this variation of the product.
14. If there is more than one variation, then specify the order in which this option appears in the **Sort Order** field. A value of **1** indicates that it appears first.
15. Click the **Save** button. This example product is shown in the web store, as shown in Figure 128.

Zolof The Rock And Roll Destroyer: LOL Cat T-shirt
2 Review(s) | Add Your Review
Availability: In stock.
$13.50
Buy 5 for $12.50 each and save 8%
Buy 10 for $11.50 each and save 15%
Buy 20 for $9.50 each and save 30%
Add to Wishlist | Add to Compare
Quick Overview
Printed on American Apparel Classic style 5495 California t-shirts.
Double click on above image to view full picture
MORE VIEWS
Size *
Color *
Choose option...
Choose option...
Green +$5.25
Red
$13.50
Qty:
Add to Cart

Figure 128. Product Variation in the Frontend

In this example, you can see that the price is **$13.50**. However, if the **Green color** is selected, then the price is **$18.75**, as shown in Figure 129.

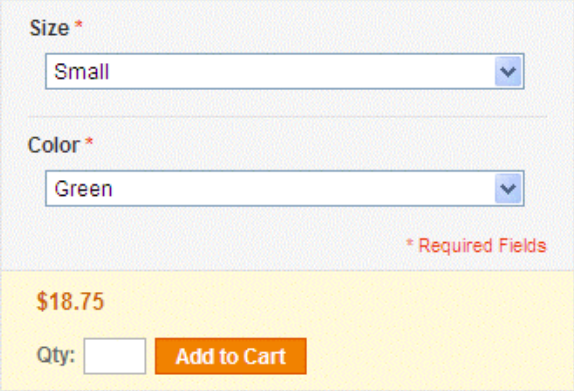
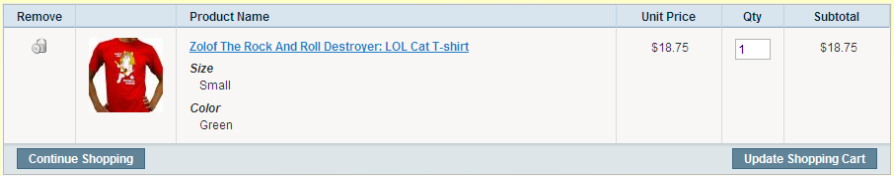



Figure 129. Price Change for Product Variation

**Note:** If this product is added to the customer's shopping cart, then the variation information appears there, as shown below:




# Importing and Exporting Product Data

Unless you have a small product catalog, the prospect of creating each product manually, one by one, is daunting. Magento CE has a solution: Import your product data from a comma-separated values (CSV) spreadsheet file. You can also export your product data to a CSV file.

## Working with CSV Files

In order to import a CSV file into Magento CE, it must have certain characteristics. Specifically, each column heading must exactly match the Attribute Code for the attribute in that column.

**Tip:** To ensure that a CSV file's column headings are understood by Magento CE, first export a product CSV file (see "Exporting Product Data," page 126). You can then edit this file (by adding or updating rows) and then re-import it.

For the Category column, specify product category in textual form based on a category's path, with a slash (/) between each category level; for example, `Furniture/Living Room`. Do not include the Root Category in the path.

# Importing Product Data

With the Import feature, you can upload a file that contains the records for as many products as you want.

The file that you upload must be in Comma-Separated Values (CSV) format. Most spreadsheet and database applications can read and create CSV files.

## To import a product CSV file:

1. In the Admin Panel, select **System > Import/Export > Import** to open the Import page, as shown in Figure 130.

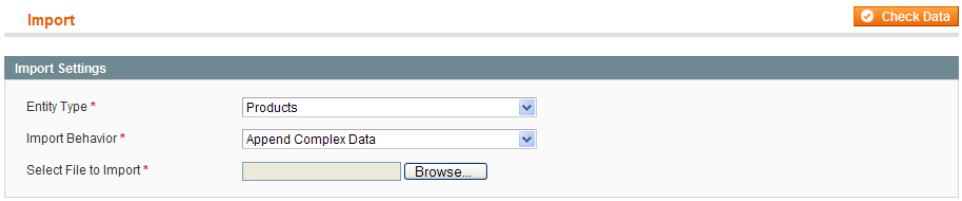



**Figure 130. Import Page**

2. Select **Products** from the **Entity Type** drop-down list.
3. Select one of the **Import Behavior** options from the drop-down list:
   - **Append Complex Data:** Adds new or edited products to your store's database. Magento CE will not create duplicate entries for existing products and customers included in your CSV file.
   - **Replace Existing Complex Data:** Completely replaces your existing data or portions thereof.
   - **Delete Entities:** Completely deletes your existing database or portions thereof.
4. Click **Browse** and locate the CSV file in your local computer's file system.

   **Note** The total size of the CSV file must not exceed the maximum size for your environment (typically 32 MB) and must be saved with UTF-8 encoding. Check your spreadsheet or database application documentation for information about saving a CSV file with UTF-8 encoding.

5. Click **Check Data** to validate the uploaded file.
6. If the uploaded file is valid, a "File is valid!" response appears. Import your products or customers by clicking **Import**. If your file contains errors, Magento CE notifies you of the errors and enables you to skip the erroneous rows and importing the valid products or customers by clicking **Import**.

When the import is complete, the "Import was successfully done" message appears.

# Exporting Product Data

## To export product information:

1. In the Admin Panel, select **System** > **Import/Export** > **Export**.
2. Select **Products** from the **Entity Type** drop-down list. The system generates a list of entity attributes that are relevant to your products.
3. By default, all attributes are exported to the CSV file. In the Entity Attributes list, select the **Skip** check box for any attributes that you want to exclude from the CSV file.
4. By default, all records are exported to the CSV file. Use the controls in the **Filter** column to limit the records that are exported.
5. Click **Continue** to export your selected product information to a CSV file.
6. Open the saved file in your favorite spreadsheet application and edit as needed.

# 7 Setting Up Your Store Hierarchy

If you have planned your store hierarchy (see "Store Hierarchy," page 25) and set up the appropriate root categories (see "Creating Categories," page 79), you are ready to set up your store hierarchy.

## To set up your store hierarchy:

1. In the Admin Panel, select **System > Manage Stores** to open the Manage Stores page, as shown in Figure 131.

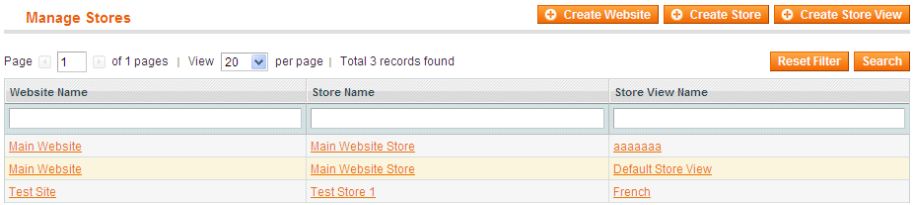



**Figure 131. Manage Stores Page**

2. To create a new website:
    a. Click **Create Website** to open the New Website page.
    b. In the **Name** field, specify a name for this website. Typically this will be the site's domain name (for example, `somecompany.com`).
    c. In the **Code** field, specify a code name that the Apache Web server will use to point to the domain name (for example, `somecompany_com`).
    d. (Optional) In the **Sort Order** field, specify an integer number to determine where this website is listed in scope-selection drop-down lists in the backend. A specification of 1 places this website at the top of the list, 2 places it second, and so on.
    e. Click **Save Website**.
3. To create a new store:
    a. From the Manage Stores page, click **Create Store** to open the New Store page.
    b. In the **Website** drop-down list, select the website that will be the parent of this store.
    c. In the **Name** field, specify a name for this store.
    d. In the **Root category** drop-down list, select the root category for this store. A root category can be assigned to more than one store, or to stores in different websites.
    e. Click **Save Store**.
4. To create a new store view:
    a. From the Manage Stores page, click **Create Store View** to open the New Store View page.

b. In the **Store** drop-down list, select the store that is associated with this store view.

c. In the **Name** field, specify a name for this store view, for example, `French`.

d. In the **Code** field, specify a code for this store view, for example, `somecompany.fr`.

e. In the **Status** drop-down list, select whether this store view is **Enabled** or **Disabled**.

f. (Optional) In the **Sort Order** field, specify an integer number to determine where this store view is listed under its associated store in scope-selection drop-down lists in the backend. A specification of 1 places this website at the top of the list, 2 places it second, and so on.

g. Click **Save Store View**.

**Note:** If you are associating a separate domain with each website, some modifications must be made to the web server configuration files. For details, see the following Magento Knowledge Base article: http://www.magentocommerce.com/knowledge-base/entry/tutorial-multi-site-multi-domain-setup

# 8 Taxes

**Important:** No guarantee is offered with respect to any of the information given here. Please contact an expert before you take any decisions about tax matters.

Magento CE provides a variety of options for defining taxes that can be accessed by selecting the **Sales** menu and then the **Tax** option. Tax classes are used to define "tax rules." Tax rules are defined as a combination of a Product Class, a Customer Class and a Tax Zone and Rate, as described below.

Each type of customer can be assigned a class when you define them, and each product is assigned a tax class. For a description of how to define a customer, see "Managing Customers," page 220. For a description of how to define a product, see "Creating a New Product," page 96.

Magento CE analyzes the shopping cart of each customer and calculates the appropriate tax according to the class of the customer, the class of the products in the shopping cart, and the region (as defined by the customer's shipping address, billing address or shipping origin).

Magento also supports the calculation of Value-Added Tax (VAT) for business-to-business transactions in the European Union. For more information, see "Appendix: VAT ID Validation," page 275.

**Note:** When you set up tax options, be sure to set your store scope so that the options are applied across stores and websites appropriately.

Important: You can restrict access to tax settings in the Admin panel by setting permissions for users. You set permissions by creating roles. For more information, see "Limiting Administrator Access to the Admin Panel (Backend)," page 245.

Note that to access tax functionality you need to make sure that the Sales/Tax areas are checked along with the System/Tax areas. If you are setting up another website and you want to load catalog prices including tax for a different region than your default shipping origin, you'll also need to allow access to the System/Shipping settings for that role, because shipping origin determines what the assumed store tax rate is for catalog prices.

**Tip:** For more information about tax updates, including recommended tax configurations for different countries, see http://www.magentocommerce.com/knowledge-base/entry/magento-ce-18-ee-113-tax-calc.

## General Taxation Settings

Tax calculations in Magento offer a considerable amount of flexibility to meet your store's legal requirements, your preferences, and the expectations of your customers. As such there are some combinations of tax-related options that can result in customer credibility issues due to how tax is calculated and displayed to your customers.

# Problem Configurations and Related Display Issues

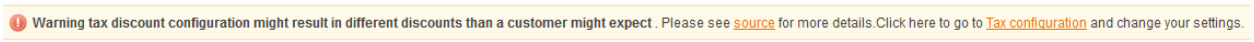
Certain tax configurations in Magento can create customer confidence issues resulting in cart abandonment. In general these conditions occur when the tax calculation method is set to Row or Total and a customer is presented with prices excluding and including tax, or tax on an item basis in the cart. In this instance, due to how rounding is done for tax calculation, there can be differences between the amount shown in the cart and the amount a customer expects to pay. These differences—if noticed by a customer—usually end up as cart abandonment, so you should avoid the problematic tax configurations.

## Catalog Prices: Excluding Tax

These settings are available in the Admin panel at **System > Configuration > Sales > Tax > Calculation Settings**, options **Catalog Prices** and Tax **Calculation Method Based On**.

| | Tax Calculation Method Based On | | |
|---|---|---|---|
| **Price Display** | **Unit Price** | **Row Total** | **Total** |
| **Excluding tax** | OK | OK | OK |
| **Including tax** | OK | OK | OK |
| **Including & Excluding tax** | OK | OK | WARNING |

If you set up your tax calculation settings in ways that trigger any of the problematic configurations discussed in this section, the system displays the following notification:


Warning tax discount configuration might result in different discounts than a customer might expect. Please see source for more details.Click here to go to Tax configuration and change your settings.

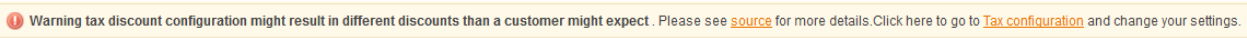
In this error message, the **source** link points to a Magento Knowledgebase article. The **Tax configuration** link takes you to **System > Configuration > Sales > Tax** in the Admin panel. There you can change your tax settings to avoid the problematic configurations detailed above.

## Catalog Prices: Including Tax

These settings are available in the Admin panel at **System > Configuration > Sales > Tax > Calculation Settings**, options **Catalog Prices** and **Tax Calculation Method Based On**.

| | Tax Calculation Method Based On | | |
|---|---|---|---|
| **Price Display** | **Unit Price** | **Row Total** | **Total** |
| **Excluding tax** | OK | OK | OK |
| **Including tax** | OK | OK | OK |
| **Including & Excluding tax** | OK | WARNING | WARNING |

If you set up your tax calculation settings in ways that trigger any of the problematic configurations discussed in this section, the system displays the following notification:


Warning tax discount configuration might result in different discounts than a customer might expect. Please see source for more details.Click here to go to Tax configuration and change your settings.

In this error message, the **source** link points to a Magento Knowledgebase article. The **Tax configuration** link takes you to **System > Configuration > Sales > Tax** in the Admin panel. There you can change your tax settings to avoid the problematic configurations detailed above.

## To configure general taxation settings:

1. From the **System** menu, select the **Configuration** option.
2. From the **SALES** section in the panel on the left, select **Tax**.
3. Expand the **Tax Classes** section, as shown in Figure 132.

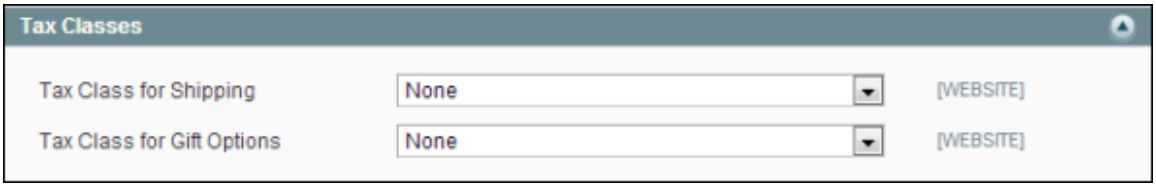



**Figure 132. Tax Class for Shipping and Gift Options**

4. In the **Tax Class for Shipping** field, designate a product tax class for the shipping amount, or select **None** if your store does not charge an additional tax on shipping expenses.
5. In the **Tax Class for Gift Options** field, designate a product tax class for gift options, or select **None** if your store does not charge an additional tax on gift options.

**Note:** For more information about product tax classes and how to set them up, see "Product Tax Class," page 135.

6. Expand the **Calculation Settings** section, as shown in Figure 133.

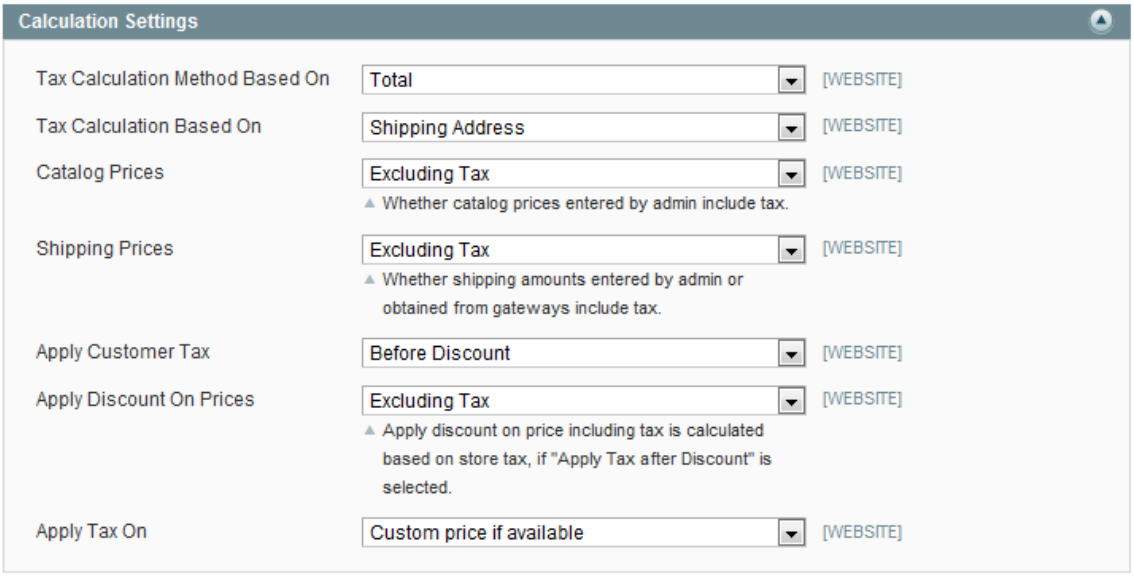



Figure 133. Tax Calculation Settings

7. In the **Tax Calculation Method Based On** field, select which amount is used as the basis for calculating taxes. Because of rounding, this selection may affect the total amount of tax you charge on an order.

| Option | Description |
|---|---|
| Unit Price | Using this rounding rule, Magento calculates the tax for each item and displays prices tax-inclusive. To calculate the tax total, Magento rounds each of the item taxes individually and then adds them together. |
| Row Total | Using this rounding rule, Magento calculates the tax for each line. To calculate the tax total, Magento rounds each of the line item taxes and then adds them together. |
| Total | Using this rounding rule Magento calculates the tax for each item and adds those tax values to calculate the total unrounded tax amount for the order. Magento then applies the specified rounding mode to the total tax to determine the total tax for the order. |

8. Set the **Tax Calculation Based On** value to one of the areas of the invoice, as shown in the following table, according to your local requirements. This setting will show your store's tax. Store tax is tax that is calculated based on your store's address, for display purposes. Actual tax for an order is calculated by Magento when the customer enters their information and the system updates the tax based on the appropriate tax rates and rules that apply to that order.

| Option | Description |
|---|---|
| Shipping Address | Use this option if your store bases tax calculation on the address to which the item is shipped. |
| Billing Address | Use this option if your store bases tax calculation on the billing address for the item. |
| Shipping Origin | Use if your store bases tax calculation on the shipping origin address. |

9. Set the **Catalog Prices** field to one of the values in the following table, according to your local requirements.

| Option | Description |
|---|---|
| Excluding Tax | Catalog prices do not include tax. |
| Including Tax | Catalog prices include tax. |

10. Set the **Shipping Prices** field to one of the values in the following table, according to your local requirements.

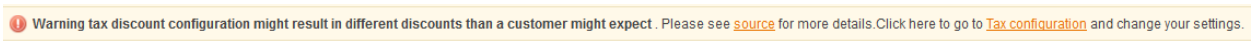
| Option | Description |
|---|---|
| Excluding Tax | Shipping prices (or those obtained from gateways) do not include tax. |
| Including Tax | Shipping prices (or those obtained from gateways) include tax. |

11. Set the **Apply Customer Tax** field to one of the values in the following table, according to your local requirements.

| Option | Description |
|---|---|
| Before Discount | Customer tax is applied before the discount is calculated.<br>**Note**: Magento advises you to not choose this option because it can lead to errors in calculating the total price. |
| After Discount | Customer tax is applied after the discount is calculated. |

**Note:** Magento strongly recommends that all merchants set **Apply Customer Tax** to **After Discount** regardless of all other tax-related settings. This avoids issues with calculating the total product price.

**Note:** In EE 1.13.1 or later, regardless of any other settings on this page, if you click **Before Discount** from the **Apply Customer Tax** list, the system displays the following notification:


Warning tax discount configuration might result in different discounts than a customer might expect . Please see source for more details.Click here to go to Tax configuration and change your settings.

12. Set the **Apply Discount on Prices** field to one of the values in the following table, according to your local requirements.

**Note**: If the **Apply Customer Tax** field is set to **After Discount**, the applied discount on price, including tax, is calculated based on store tax. Store tax is calculated based on the store's address for display purposes. The actual tax that a customer pays on an order is calculated when the customer enters a shipping address and the system updates tax based upon your store's tax configuration settings.

| Option | Description |
|---|---|
| Excluding Tax | Any discount on prices is applied excluding tax. |
| Including Tax | Any discount on prices is applied including tax. |

13. Set the **Apply Tax On** field to one of the options in the following table, according to your local requirements.

| Option | Description |
|---|---|
| Custom price if available | Tax is applied to any custom prices available. |
| Original price only | Tax is applied to the original price only. |

14. Expand the **Default Tax Origin Calculation** section to specify which country is used by Magento as the default for tax calculation, as shown in Figure 134.

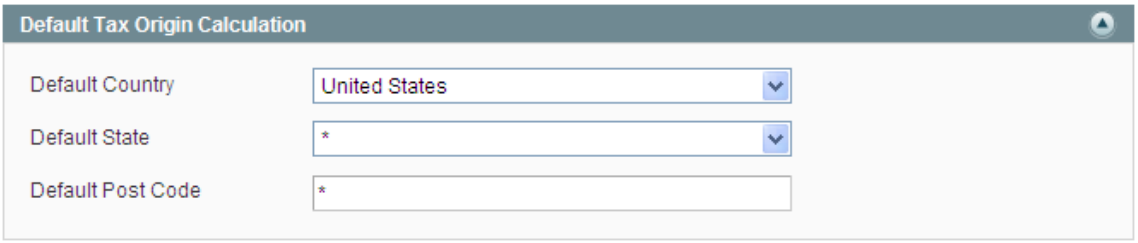



Figure 134. Default Tax Origin Calculation

**Note:** If you select **Including** Tax for any of the options described in the following steps, then the tax is only displayed if there is a tax rule that matches the tax origin or if Magento detects that the customer address matches the tax rule (which happens after a customer creates an account, logs in, or uses the Tax and Shipping estimation tool in the cart).

15. Expand the **Price Display Settings** tab to select how prices for products shipping are displayed in the catalog (including tax, excluding tax, or both).

16. Expand the **Shopping Cart Display Settings** section to select how taxes and prices are shown for products and in a shopping cart according to the requirements (legal and otherwise) of your store, as shown in Figure 135.

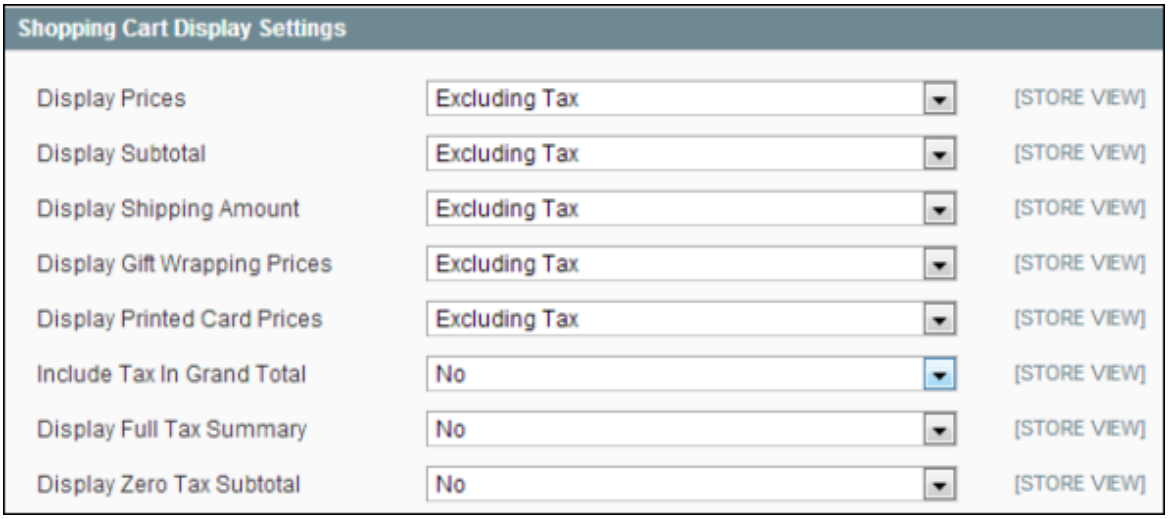



Figure 135. Shopping Cart Tax Display Settings

17. Expand the **Orders, Invoices, Credit Memos Display Settings** tab to select how prices and taxes are displayed in orders, invoices, and credit memos.

18. Expand the **Fixed Product Taxes** tab to specify the behavior of fixed per product taxes, such as the European DEEE/WEEE (**Waste Electrical and Electronic Equipment**) tax, according to the requirements for your store and products.

**Note:** To assign a fixed tax to a product, create an attribute with the **Catalog Input Type for Store Owner** set to **Fixed Product Tax**, and assign this attribute to the attribute set for the product.

# Product Tax Class

You create product tax classes and assign products to them depending on the type of product. For example, food might not be taxed (or might be taxed at a different rate).

### To define a product tax class:

1. Select **Sales > Tax > Product Tax Class** to display the Product Tax Classes page (Figure 136), which shows a list of the previously defined product tax classes.

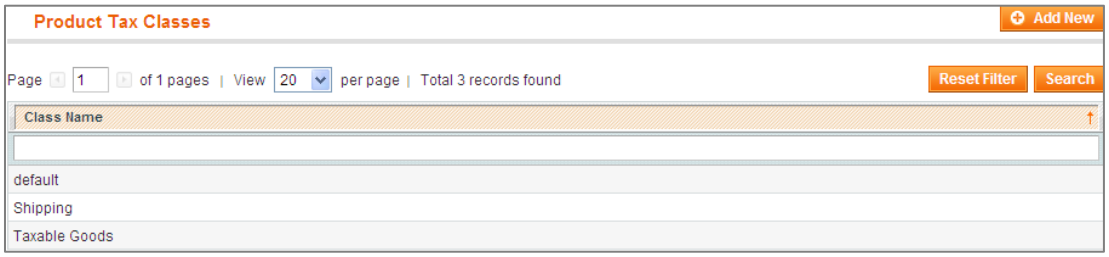



**Figure 136. Product Tax Classes Page**

2. Click the **Add New** button to display the New Class page, as shown in Figure 137.

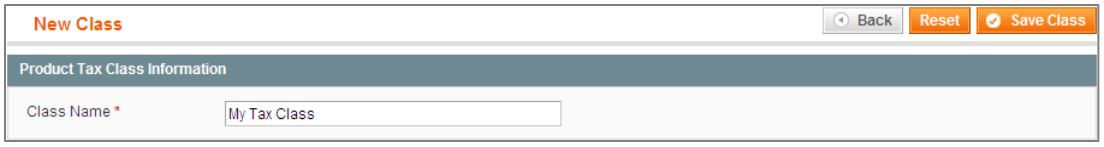



**Figure 137. New Product Tax Class Page**

3. In the **Class Name** field, specify a name for this tax class.

**Note:** You can apply a tax class to a product by editing the product and choosing the appropriate option on the **Prices** tab.

4. Click **Save Class**.

# Customer Tax Class

You create customer tax classes and assign customers to them depending on the type of customer. For example, in some jurisdictions, wholesale transactions are not taxed but retail transactions are.

### To define a customer tax class:

1. Select **Sales > Tax > Customer Tax Classes** to display a list of the previously defined customer tax classes.
2. Click the **Add New** button to display the New Class page, as shown in Figure 138.

Figure 138. New Customer Tax Class Page

3. In the **Class Name** field, specify a name for this tax class.

**Note:** You can link a customer tax class to a customer group by editing the customer group. You can then assign this customer group when creating or editing a customer.

4. Click the **Save Class** button.

# Tax Zones and Rates

Tax rates are generally applicable to transactions that take place in specific geographical areas. The Tax Zones and Rates feature enables you to specify the tax rate for each geographical area for which you collect and remit taxes. Because you give each tax zone and rate specification a unique identifier, you can have multiple tax rates for a given geographic area (for example, for places that do not tax food or medicine but tax other products).

**Note:** Store tax is used for initial display purposes on orders. Store tax is calculated based on the store's address. Actual customer tax on an order is calculated after a customer enters their information, and then Magento calculates the actual tax based upon your store's tax configuration.

## To define tax zones and rates:

1. Select **Sales > Tax > Manage Tax Zones and Rates** option to display a list of the previously defined tax zones and rates.

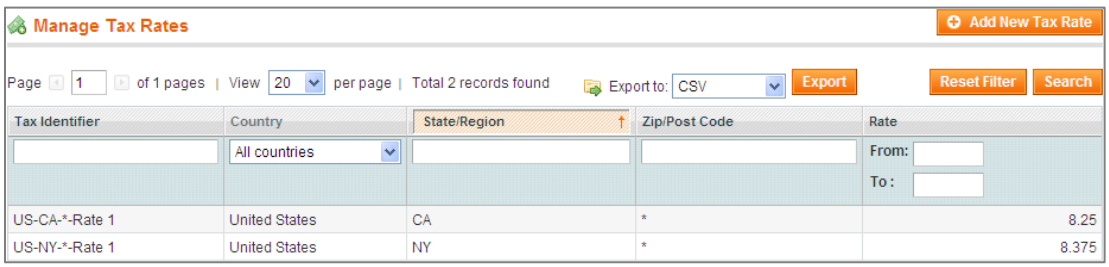



Figure 139. Manage Tax Rates Page

2. Click **Add New Tax Rate** to display the Add New Tax Rate page, as shown in Figure 140.

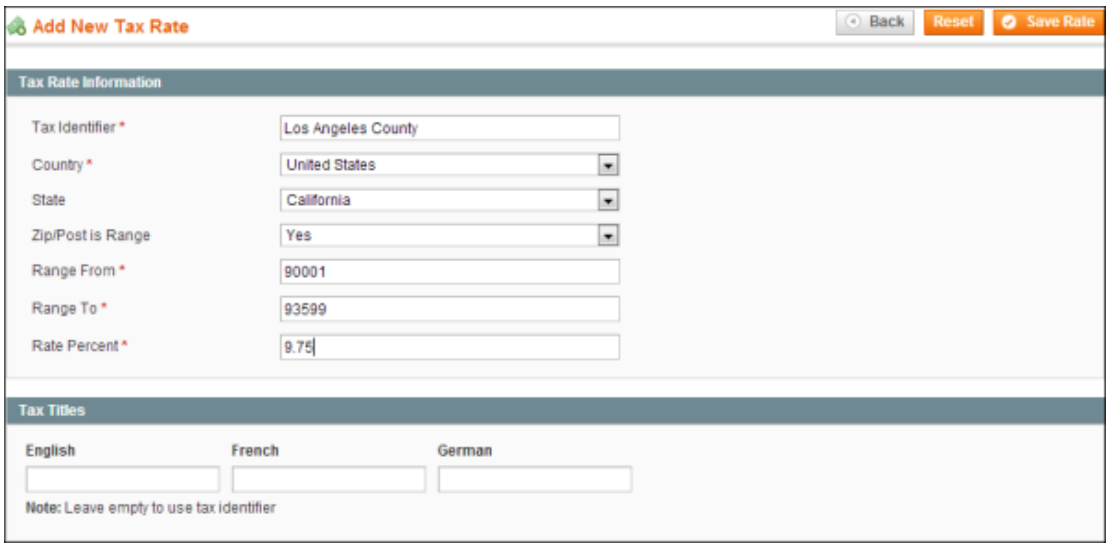



Figure 140. Add New Tax Rate Page

3. Set the **Tax Rate Information** (and optional **Tax Titles**) options as shown in the following table.

| Option | Description |
|---|---|
| **Tax Identifier** | This is the title of the newly created tax rate. Do not use spaces. This identifier is not visible to customers if the alternate Tax Titles section is used. |
| **Country** | Select the country to which the specific tax applies. Country is required. |
| **State** | Available for countries that have states. You have the following options:<br>• To apply the tax rates to all states, click * (asterisk), a wildcard character that enables you to apply the same tax rate to all states in the selected country.<br>• To select a state, click the name of a state to which to apply a tax rate. |
| **Zip/Post is Range** | • If you click **No**, specify the zip or postal code in the Zip/Post Code field. You can use the * (asterisk) wildcard character in this field; for example, 90* means all zip codes from 90000 through 90999.<br>• Click **Yes** if you want this tax applied to a specific range of Zip codes. |
| **Range From / Range To** | Specify the starting and ending Zip or postal code ranges. |
| **Rate Percent** | Specify the tax rate percent as a value of 0 (zero) or greater. For example, enter 9.75 for a tax rate of 9.75%. |
| **Tax Titles** | This option applies only if you have a store in different languages and you want to have the languages displayed differently. Tax Titles let you name your tax rate if you have a store that is translated into different languages and you use the same tax rates for all languages. |

4. Click the **Save Rate** button.

5. The Manage Tax Rates page is displayed, where you can arrange your tax rates by using the sort filters at the top of the grid, and by clicking the column headings to sort the tax rates.

**Tip:** You can export your tax rates to either CSV (comma-separated value) format or Excel XML format using the **Export** button at the top of the grid. It can be easier to manage your tax rates in a spreadsheet format if you are familiar with the requirements for importing and exporting in CSV or XML formats.

# Tax Management Rules

Tax rules are defined as a combination of a customer tax class and a product tax class with a tax rate. In other words, based on the class of the customer (customer tax class), the class of the products (product tax class) in the shopping cart, and the region (tax rate depending on the shipping address, billing address, or shipping origin), Magento calculates the appropriate tax for each order.

**Note:** When you set up tax options, be sure to set your store scope so that the options are applied across stores and websites appropriately.

## To define Tax Management Rules:

1. To define how taxes are charged, select **Sales > Tax > Manage Tax Rules** to display a list of the previously defined tax rules, as shown in Figure 141.

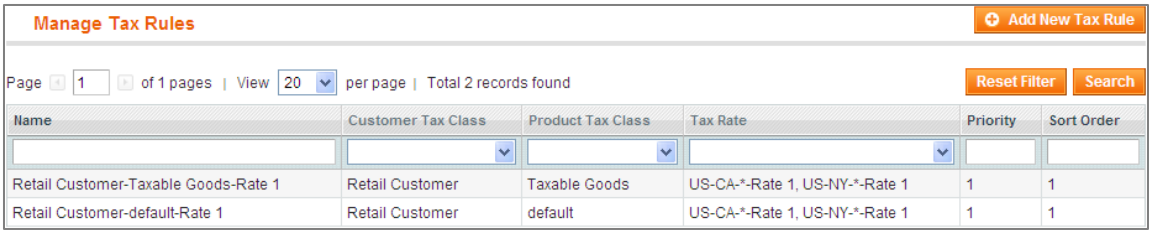



**Figure 141. Manage Tax Rules Page**

Each tax rule is composed of a customer tax class, a product tax class, and a tax rate.

2. To define a new tax rule, click **Add New Tax Rule** to display the Edit Rule page, as shown in Figure 142.

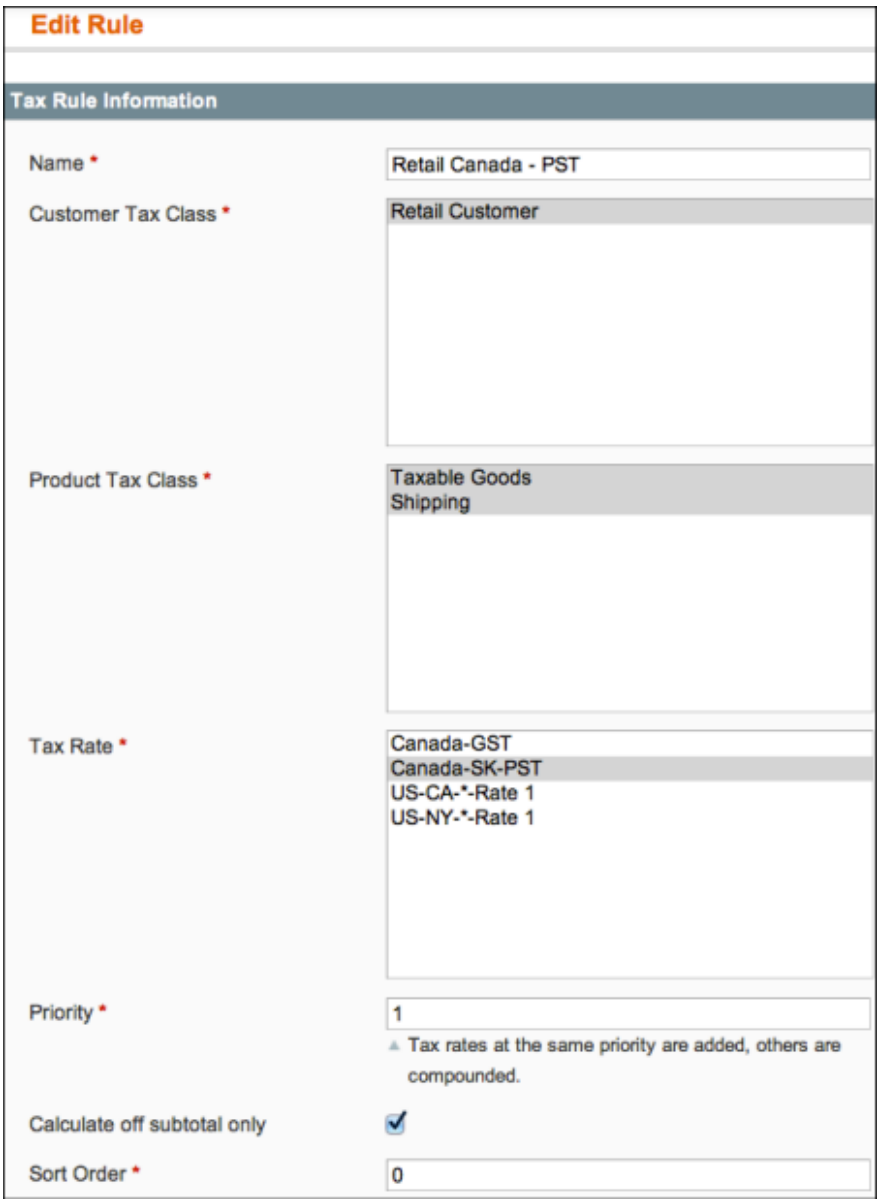



Figure 142. Edit Rule Page

3. In the **Tax Rule Information** area, select the options as shown in the following table.

| Option | Description |
|---|---|
| **Name** | Specify a name for this tax rule that will make it easy to identify. |
| **Customer Tax Class** | Select the customer tax class to which you will apply this tax rule. |
| **Product Tax Class** | Select the product tax class to which you will apply this tax rule. |
| **Tax Rate** | Select the tax rate to apply for this tax rule. |

| Option | Description |
|---|---|
| Priority | Specify the priority of this tax, when more than one tax applies. Lower numbers have higher priority. If two tax rules with the same priority apply then the taxes are added together. If two taxes with a different priority apply then the taxes are compounded. When taxes are compounded, the first priority tax is calculated on the subtotal amount, and then the second priority tax is calculated on the subtotal plus the first priority tax amount. |
| Calculate off subtotal only | Important: Check this checkbox for taxes to be calculated off only the subtotal of the order. This means that for this tax rule, tax applies only to the subtotal of the order. |
| Sort Order | Specify the order in which tax rules are displayed on the Manage Tax Rules page. Lower numbers have higher sort order in the list. |

4. Click **Save Rule** or **Save and Continue Edit** to save your changes.

**Tip:** When numerous taxes must be defined, you can ease the process by importing them from a spreadsheet. Select **Sales > Tax > Import/Export Tax Rates**.

# Fixed Product Tax

Some tax jurisdictions have a fixed tax that must be added to certain types of products. Magento lets you set up a fixed product tax (FPT) for use in your store's tax calculations. For example, in some countries FPT can be used to set up a Waste Electrical and Electronic Equipment Directive (WEEE) tax, also known as "ecological tax" or "eco tax," that is collected on certain types of electronics to offset the cost of recycling. This tax is a fixed amount, rather than a percentage of the product price.

Your tax jurisdiction might also have rules about how you display the price of products to your customers, either with or without tax. Be sure you understand those rules so that you can set your FPT display options accordingly.

## Fixed Product Tax (FPT) Calculation

Fixed product taxes are applicable at an item level based on the product. In some jurisdictions this tax is subject to an additional % tax calculation.

| FPT taxed/not taxed | Display setting and associated calculation |
|---|---|
| FPT is not taxed | • **Excluding FPT**: Treat FPT as a separate row in the cart and include the value of FPT in the appropriate tax calculations.<br>• **Including FPT:** FPT is added to the base price of an item but is not included in tax- rule-based calculations.<br>• **Excluding FPT, FPT description, final price:** Item prices are shown without FPT, FPT amount, and with FPT included. FPT is not included in tax-rule-based calculations. |

| FPT taxed/not taxed | Display setting and associated calculation |
|---|---|
| FPT is taxed | • **Excluding FPT:** Treat FPT as a separate row in the cart and include the value of FPT in the appropriate tax calculations.<br>• **Including FPT:** FPT is included in the price of an item, and no change to tax calculations is required.<br>• **Excluding FPT, FPT description, final price:** Item prices are shown without FPT, FPT amount, and with FPT included. FPT is included in tax-rule-based calculations. |

**Note:** How you set the option to **Display Prices in Sales Modules** and **Display Prices in Emails** can affect customer confidence in their orders. For example, if you choose to display Order Review prices without showing FPT, customers who buy items with associated FPT will see a total that includes the FPT tax amount, but they will not see an itemized entry for this amount. This might cause abandoned carts if your customers see an order total that does not match what they expect, based on an itemized list of products in the order.

## Step 1: Enable the FPT Tax

### To enable FPT:

1. From the Admin panel, select **System** > **Configuration.**
2. In the Configuration panel on the left, under Sales, select **Tax.**
3. Click to expand the **Fixed Product Taxes** section. The section displays the set of options shown in the following figure.

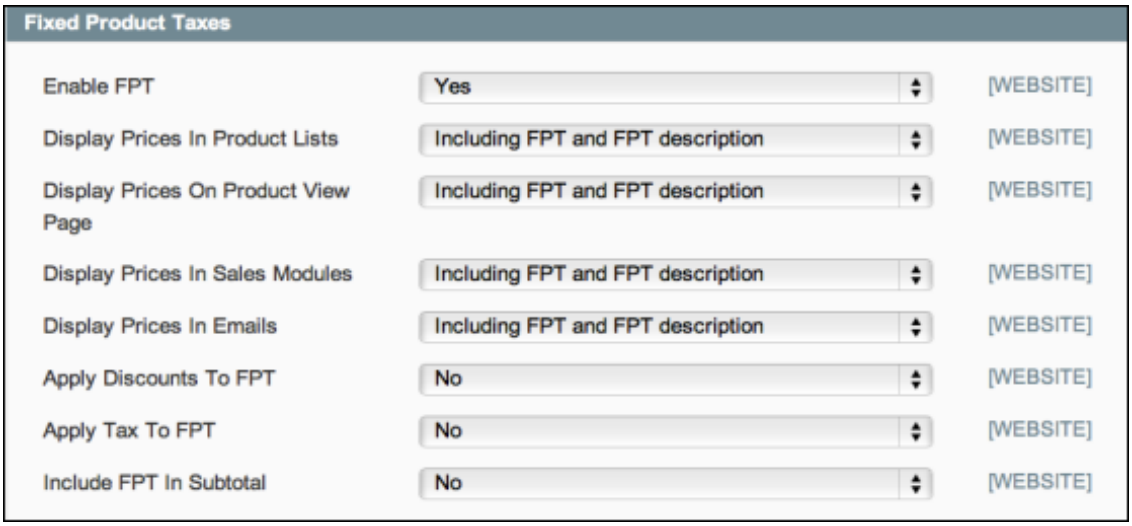



**Figure 143. Fixed Product Taxes Options**

4. Specify the following information:

| Option | Description |
|---|---|
| **Enable FPT** | Click Yes. |
| **Display Prices In Product Lists** | Specifies how prices display in products lists, such as the category page. |
| **Display Prices On Product View Page** | Specifies how prices display on the product page. |
| **Display Prices In Sales Modules** | Specifies how prices appear in the Order Review section during checkout, and in the Items Ordered section of a sales order. |
| **Display Prices In Emails** | Specifies how prices display in the sales email confirmation that is sent when an order is placed. |
| Settings for:<br>**Display Prices In Product Lists**<br>**Display Prices On Product View Page**<br>**Display Prices In Sales Modules**<br>**Display Prices In Emails** | Click one of the following:<br>• **Including FPT** only to display in the cart a price that includes a fixed product tax, but not a description of the tax.<br>• **Including FPT and FPT description** to display in the cart a price that includes a fixed product tax and a description of the tax.<br>• **Excluding FPT** to display in the cart a price that does not include a fixed product tax.<br>• **Excluding FPT, FPT description, final price** to display in the cart a price that does not include FPT, but display the FPT amount and subtotal on separate lines. |
| **Apply Discounts To FPT** | Click **Yes** to apply discounts to the fixed product tax amount.<br>Click **No** to apply discounts to the base price of a product without the fixed product tax included. |
| **FPT Tax Configuration** | *(Available in EE 1.13.1 and later only)* Determines how FPT tax is calculated as follows:<br>• **Not Taxed**: Click this option if your taxing jurisdiction does not tax FPT. (For example, the state of California does not tax FPT.)<br>• **Taxed**: Click this option if your taxing jurisdiction does tax FPT. (For example, Canada taxes FPT.)<br>• **Loaded and Displayed with Tax**: Click this option if FPT is added to the order total before applying tax (for example, in EU countries). |
| **Apply Tax to FPT** | *(Available in EE 1.13.0.x and earlier only)*<br>Click **Yes** to apply tax to the fixed product tax amount.<br>Click **No** to apply tax to the base price of products without the fixed product tax included. |
| **Include FPT In Subtotal** | Click **Yes** to include fixed product tax in the shopping cart subtotal.<br>Click **No** to display fixed product tax under the shopping cart subtotal and is not included in the subtotal itself. |

If you select **Excluding FPT, FPT description, final price**, the following figure shows what your customers see on the shopping cart page.

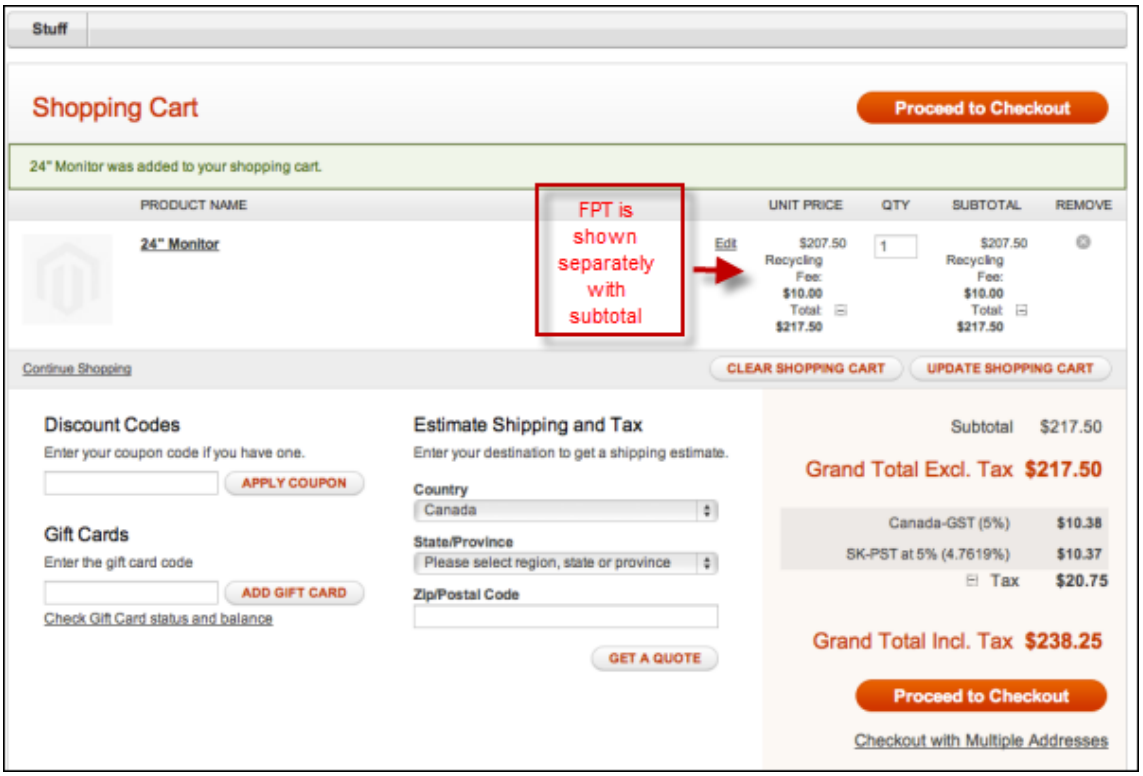



**Figure 144. Shopping Cart Page with FTP Shown**

5. When complete, click the **Save Config** button to save the settings.

## Step 2: Create a Fixed Product Tax Attribute for Products

### To create the attribute:

1. From the Admin panel, select **Catalog** > **Attributes** > **Manage Attributes.**
2. To add a new FPT product attribute, click the **Add New Attribute** button in the upper right.
3. In the **Attribute Code** field, specify a unique identifier for this attribute. Do not use spaces or special characters. However, you can use hyphens or underscores. The maximum length is 30 characters. In this example, "eco_tax" is the attribute code.
4. In the **Scope** field, select the level at which the values of this attribute are shared, as shown in the following table.

| Option | Description |
|---|---|
| Global | The value of this attribute for a given product must be the same throughout your website. |
| Website | The value of this attribute for a given product can differ on different websites; however, it cannot differ between store views contained under the same website. |

| | |
|---|---|
| **Store View** | The value of this attribute for a given product can differ on all websites and all store views. For example, if you were creating an attribute called Color, with a Store View scope, you would be able to set the color of a product to green in one store view, and blue in another store view. |

5. In the **Catalog Input Type for Store Owner** field, select "Fixed Product Tax."
6. In the Apply To field, select one of the following options:
    - **All Product Types**
    - **Selected Product Types:** If you select this option, a dropdown list shows the product types to which you can choose to apply this attribute.
7. Click **Save Attribute**.

The following figure shows the New Product Attribute for the Fixed Product Tax.

New Product Attribute
Back
Reset
Save Attribute
Save and Continue Edit
Attribute Properties
Attribute Code *
eco_tax
For internal use. Must be unique with no spaces. Maximum length of attribute code must be less then 30 symbols
Catalog Input Type for Store Owner
Fixed Product Tax
Apply To *
All Product Types

**Figure 145. Fixed Product Tax Attribute**

## Step 3: Assign the FPT Attribute to an Attribute Set

### To assign the new attribute to an attribute set:

1. From the Admin panel, select **Catalog > Attributes > Manage Attribute Sets**.
2. In the **Manage Attribute Sets** area, click the name of the attribute set in which you want to include the FPT attribute. This example uses the Default attribute set.
3. The **Edit Attribute Set 'Default'** area displays a list of Groups and a list of Unassigned Attributes. Find your FPT attribute (eco_tax in this example) in the unassigned list and drag and drop it into the attribute group where you want it to appear.
4. Click **Save Attribute Set**.

In this example the eco_tax attribute is included the General attribute group, as shown in the following figure.

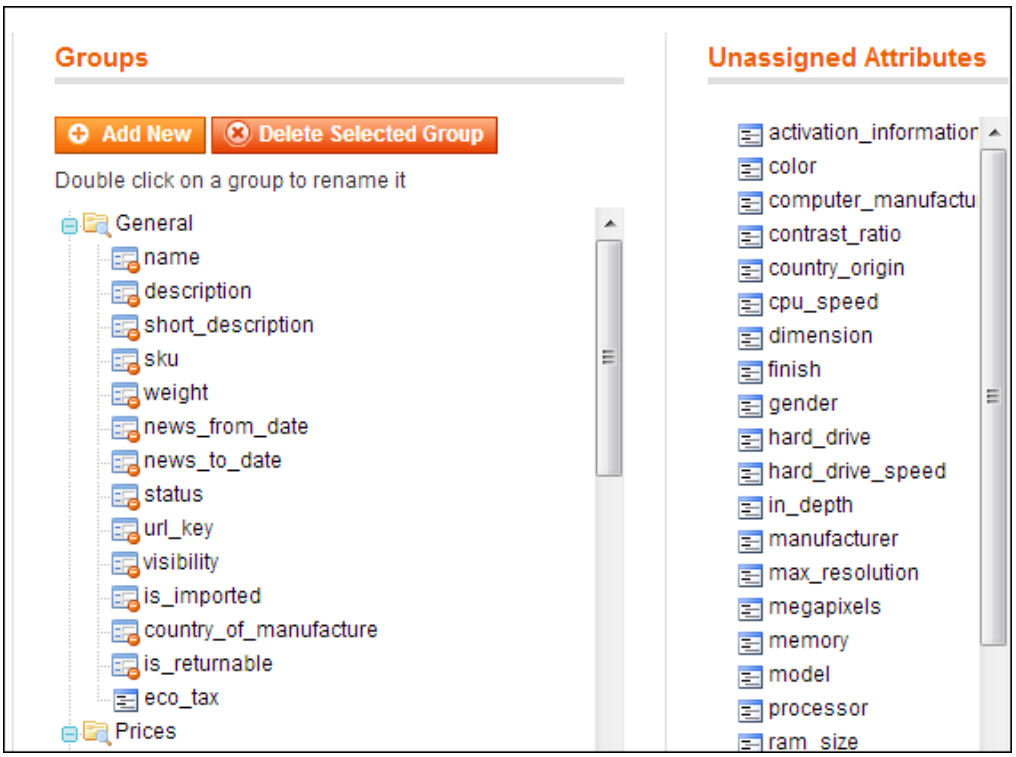



Figure 146. General Attributes Group with FPT Tax Attribute

## Step 4: Apply the Fixed Product Tax to Products

To apply the FPT to products:

1. From the Admin panel, select **Catalog** > **Manage Products.**
2. For the product to which you want to add the FPT, click the **Edit** link in the Action column.
3. In the **Eco Tax** area, set the scope for the tax and the countries and states in which this tax will apply. Depending on the choices you make, the input fields change to accommodate the details of where the tax will apply.
4. In the **Tax** box, enter the amount for the Fixed Product Tax.
5. To add more countries or states to which to apply the FPT, click the **Add Tax** button. You can apply a different amount for the tax for each locale where it applies.
6. When finished, click **Save.**

# Value-Added Tax

Some countries charge a value added tax, or VAT, on goods and services. There can be different VAT rates depending on which stage you as a merchant are at in the manufacture or distribution of the products, materials, or services that you sell to your customers. In this case you may need to use more than one VAT rate in your store for tax calculation purposes.

This section provides a sample procedure for setting up a 20% VAT in the U.K. for sales to retail customers. For other tax rates and countries, follow the general procedure but enter specific information that corresponds to your country, VAT rate, customer types, and so on.

**Note:** Before proceeding, make sure to find out which rules and regulations apply to VAT in your area.

**Note:** In certain business-to-business transactions, VAT is not assessed. Magento can validate a customer's VAT ID to ensure that VAT is assessed (or not assessed) properly. For more information, see "Appendix: VAT ID Validation," page 275.

## Step 1: Set Up Customer Tax Classes

### To set up example VAT customer tax classes:

1. From the Admin panel, select **Sales** > **Tax** > **Customer Tax Classes**.
2. Ensure that there is a customer tax class that is appropriate to use with the VAT. For this example, ensure that there is a customer tax class named **Retail Customer**. If Retail Customer does not exist, add it using the **Add New** button.

## Step 2: Set Up Product Tax Classes

### To set up example VAT product tax classes:

1. From the Admin panel, select **Sales** > **Tax** > **Product Tax Classes**.
2. Click the **Add New** button and add three new classes:
    - **VAT Standard**
    - **VAT Reduced**
    - **VAT Zero**
3. Click the **Save Class** button for each new class that you add.

## Step 3: Set Up Tax Zones and Rates

### To set up example VAT tax zones and rates:

1. From the Admin panel, select **Sales** > **Tax** > **Manage Tax Zones** & **Rates**.
2. For this example you can choose to remove the U.S. tax rates, or leave them as they are.
3. Click the **Add New Tax Rate** button. Add new rates as shown in the table below.

| New Tax Rate | Settings |
|---|---|
| VAT Standard | • **Tax Identifier**: VAT Standard<br>• **Country and State**: United Kingdom<br>• **Rate Percent**: 20.00 |

| New Tax Rate | Settings |
|---|---|
| VAT Reduced | • **Tax Identifier**: VAT Reduced<br>• **Country and State**: United Kingdom<br>• **Rate Percent**: 5.00 |

4. Click the **Save Rate** button for each new rate that you add.

## Step 4: Set Up Tax Rules

A tax rule is a combination of a customer tax class, a product tax class, and a tax rate.

### To set up example VAT rules:

1. From the Admin panel, select **Sales** > **Tax** > **Manage Tax Rules**.
2. Add new tax rules as shown in the table below.

| New Tax Rule | Settings |
|---|---|
| VAT Standard | • **Name:** VAT Standard<br>• **Customer Tax Class:** Retail Customer<br>• **Product Tax Class:** VAT Standard<br>• **Tax Rate:** VAT Standard Rate |
| VAT Reduced | • **Name:** VAT Reduced<br>• **Customer Tax Class:** Retail Customer<br>• **Product Tax Class:** VAT Reduced<br>• **Tax Rate:** VAT Reduced Rate |

3. Click the **Save Rule** button to save your VAT tax rules.

## Step 5: Apply Tax Classes to Products

### To apply example VAT classes to products:

1. From the Admin panel, select **Catalog** > **Manage Products**.
2. Select a product from your catalog to edit.
3. In the Product Information tab, in the General section, find the **Tax Class** option.
4. From the list, select the VAT class that applies to the product.
5. When finished, click the **Save** button.

# Compound Taxes

For compound taxes, the total cost of a product or service is taxed at one rate, and then the total of that amount, including the first tax amount, is taxed a second time. Compound tax is also known as stacked tax.

For example, in a regular tax calculation involving two tax rules, each rule is applied separately to the product subtotal, and the taxes are added together to calculate the total tax, which is then added to the product subtotal to calculate the grand total:

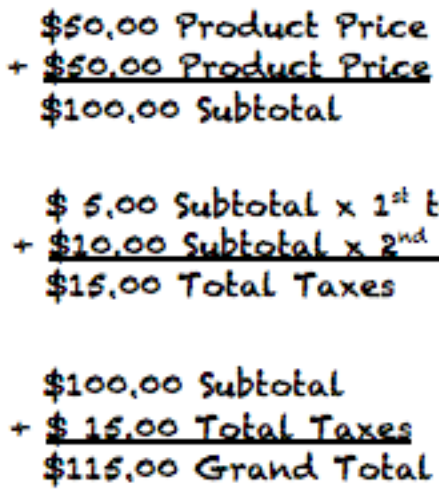

$50.00 Product Price
+ $50.00 Product Price
$100.00 Subtotal
$ 5.00 Subtotal x 1st tax rate 5%
+ $10.00 Subtotal x 2nd rate 10%
$15.00 Total Taxes
$100.00 Subtotal
+ $ 15.00 Total Taxes
$115.00 Grand Total

Figure 147. Regular Two-Tax Calculation

With compound taxes, the first tax is added to the product subtotal, and the second tax is applied to that total:

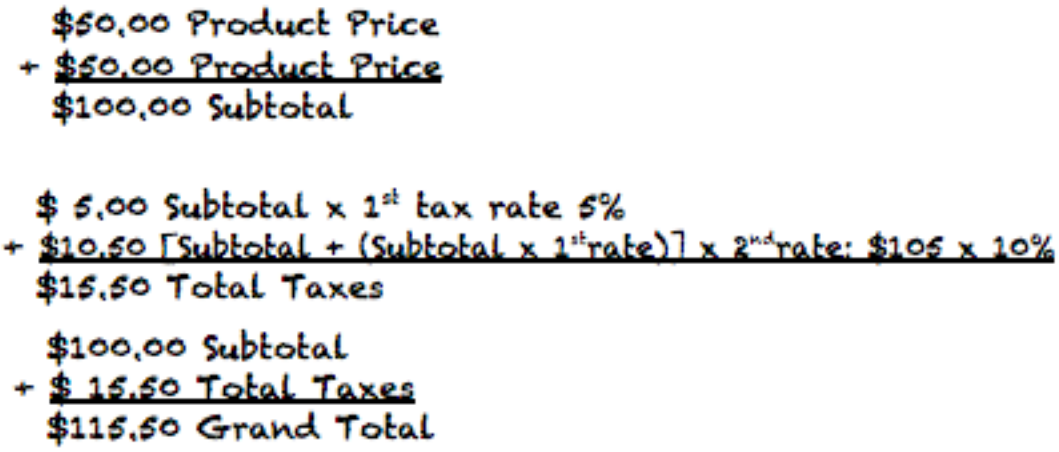

$50.00 Product Price
+ $50.00 Product Price
$100.00 Subtotal
$ 5.00 Subtotal x 1st tax rate 5%
+ $10.50 [Subtotal + (Subtotal x 1st rate)] x 2nd rate: $105 x 10%
$15.50 Total Taxes
$100.00 Subtotal
+ $ 15.50 Total Taxes
$115.50 Grand Total

Figure 148. Compound Tax Calculation

## Setting Up a Compound Tax

You set up a compound tax in Magento using different priorities for tax rules. If two tax rules with the same priority apply then the taxes are added together. If two taxes with a different priority apply then the taxes are compounded. When taxes are compounded, the first priority tax is calculated on the subtotal amount, and then the second priority tax is calculated on the subtotal plus the first priority tax amount. Lower numbers have higher priority.

**Important:** In order for compound taxes to work correctly do not select the **Calculate off subtotal only** check box when you set up your tax rules that apply to compound taxes. This check box overrides the compounding calculation and cannot be used in conjunction with compound taxes.

## To set up compound taxes:

1. Set up all the tax rates that will be used in your compound tax rule. See "Tax Zones and Rates," page 136.
2. Set up the first tax rule for compounding. For the first tax rule, be sure that you set a higher priority than you will set for the next tax rule, which will be compounded on top of this first tax rule. Lower numbers are used for higher priority. Use 0 for the highest priority. See "Tax Management Rules," page 138.
3. Set up the second tax rule for compounding. For the second rule, be sure that you set a lower priority (use a higher number) than you set for the first tax rule.

# 9 Shipping

A variety of shipping rates are available for selection in Magento CE. This section describes a few of these shipping rate options for your web store.

## General Shipping Settings

### To configure general shipping settings:

1. Select **System > Configuration > Shipping Settings**.
2. Expand the **Origin** section and specify the address used for shipping calculations. Typically, this is the warehouse address from which products are shipped, as shown in Figure 149.

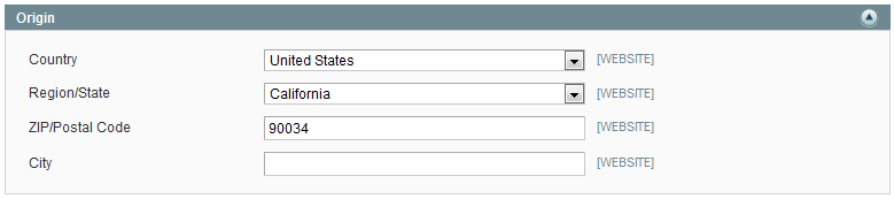



**Figure 149. Shipping Origin Settings**

3. Expand the **Options** section, as shown in Figure 150.

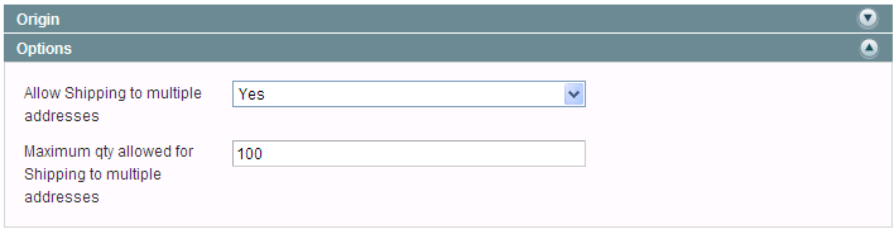



**Figure 150. Shipping Options Settings**

4. In this section, enable or disable shipping to multiple addresses. Shipping to multiple addresses is very useful for stores that sell gifts. It enables customers to send various parts of an order to different destinations.
5. Click **Save Config** to save your changes.

## Flat Shipping Rates

A flat shipping rate refers to a fixed predefined cost for shipping which can be applied per item or per shipment, according to your preferences.

### To define flat shipping rates:

1. Select **System > Configuration > Shipping Method**.

2. Expand the **Flat Rate** section to define a fixed predefined amount for shipping, as shown in Figure 151.

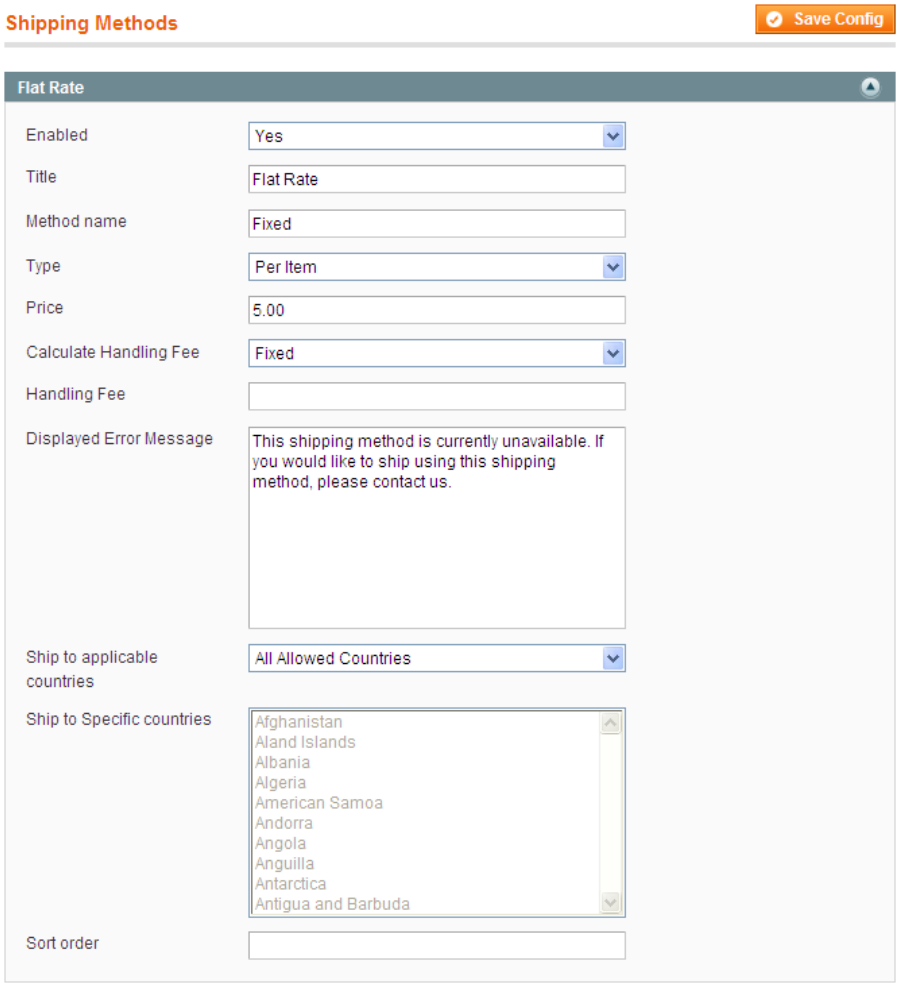



**Figure 151. Flat Rate Shipping Settings**

**Tip:** Magento CE also provides the option to specify table rates by expanding the **Table Rates** section. This feature enables you to define shipping rates by weight, destination, price, the number of items and various combinations of these categories. The table rates are entered by importing a CSV file. See http://www.magentocommerce.com/knowledge-base/entry/how-do-i-set-up-table-rate-shipping for more information.

3. In the **Enabled** field, select **Yes**. The flat rate method then appears as an option in the shopping cart and on the shipping page during the checkout.

4. The contents of **Title** and **Method name** fields appear in the frontend as shown in Figure 152.

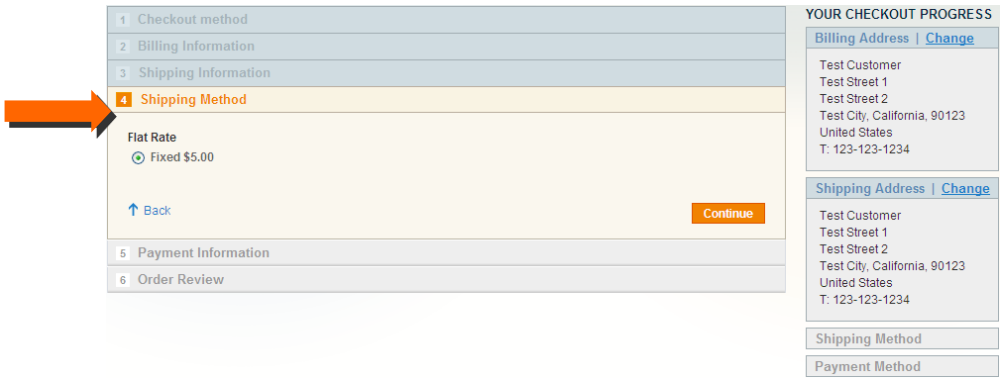



Figure 152. Flat Rate Shipping Method and Title

**Note:** Some Shipping Methods, such as UPS, provide a variety of shipping methods to choose from.

5. In the **Type** field, specify the entity to which the shipping fee applies, such as **Per Item**. In this case, the shipping fee is dependent on the number of items shipped. If you set the rate to be per item, it is multiplied by the total quantity of items in the shopping cart. If you have two of the same item or two different items, then the rate is the same. You can also select **Per Order** in this field.

6. In the **Ship to applicable countries** field, you can select the **Specific Countries** option to enable access to the field under it in which you can select specific countries, so that the appropriate (and different) shipping rates are applied to the relevant countries, as shown in Figure 153.

Figure 153. Specific Countries Selection

**Tip:** Hold down the Ctrl key while clicking options to select multiple countries.

7. In the **Sort Order** field, specify the position of this shipping method in relation to the other shipping methods offered to the customer.

# Online Rates

Apart from static options such as flat rates and table rates, Magento CE also offers dynamic retrieval of rates from various shipping providers.

**Note:** Most shipping providers require that you open an account with them. Consult your shipping provider for details on how to obtain API credentials.

To enable and configure these shipping methods, expand the appropriate tabs (**UPS**, **USPS**, **FedEx**, or **DHL**) and configure the settings. The configuration of this method is similar to the configuration of a Flat Rate, as described above. The exact options depend on the service provider; contact the provider for more information.

For example, UPS rates can appear in your web store as shown in Figure 154.

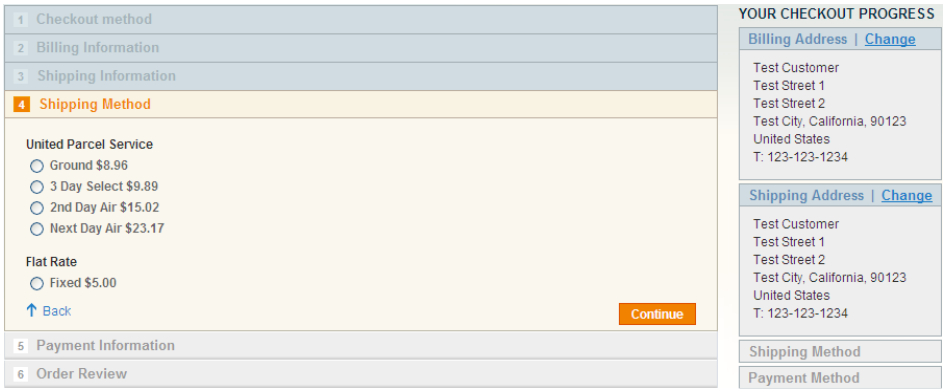



Figure 154. UPS Shipping Options

# Offering Free Shipping

**Tip:** Free shipping per product can be defined as a shopping cart price rule. See "Promotions," page 185, for more information. This option enables you to set up free shipping that is valid only when a customer provides the appropriate discount code.

## To define free shipping:

1. Select **System > Configuration > Shipping Methods.**
2. Expand the **Free Shipping** section to enable free shipping with optional minimum order amount, as shown in Figure 155.

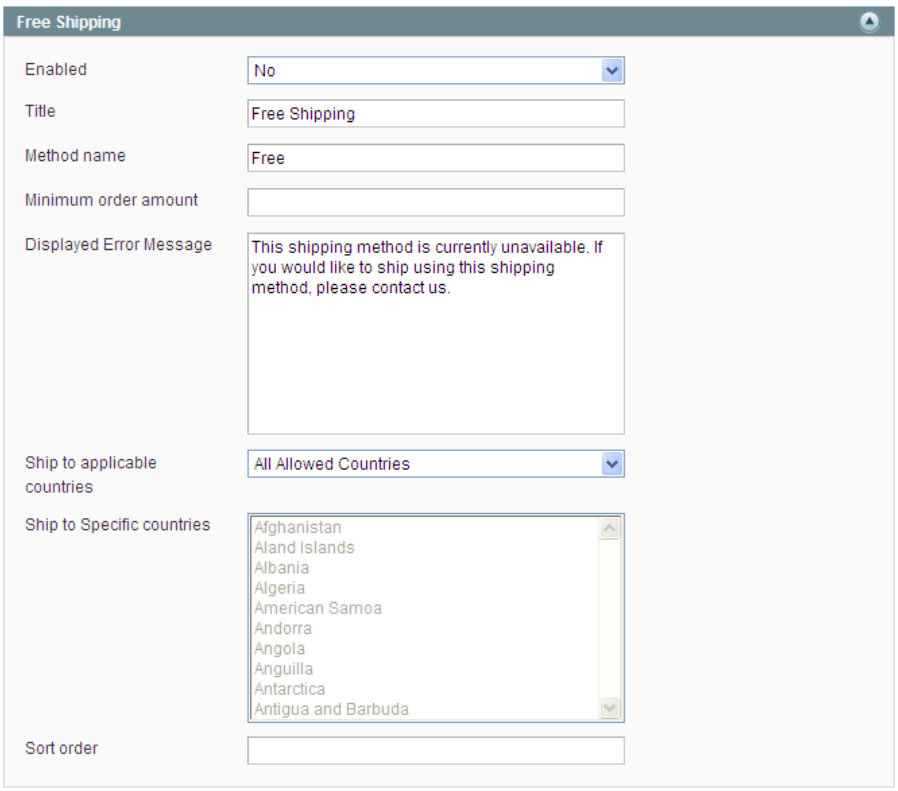



Figure 155. Free Shipping Settings

3. In the **Enabled** field select **Yes** to enable the method.
4. In the **Minimum order amount** field specify the amount for an order over which shipping is provided free of charge.
5. In the **Ship to applicable countries** field, you can select the **Specific Countries** option to enable access to the field under it in which you can select specific countries, so that free shipping is only applied to the relevant countries or you can select the **All Allowed Countries** to specify that free shipping is available for users from all countries.

# Acquiring Additional Shipping Modules

Numerous other shipping modules are provided at http://www.magentocommerce.com/magento-connect and new ones are uploaded often. More information on installing shipping extensions is provided in “Extending Magento,” page 252.

# 10 Payment

Now that you have a method to calculate the cost of the shipping of your products, you can configure the payment options that enable the collection of money. Magento CE offers several payment options and many more can be added by downloading Magento payment module extensions, provided at http://www.magentocommerce.com/magento-connect. More information on installing payment module extensions is provided in "Extending Magento," page 252.

The following shows how to set up some of the most popular payment methods. Setting up other options is just as simple.

## PayPal

PayPal is one of the most popular ways to accept online payments. It enables you to accept credit cards and PayPal accounts. This section shows how to set up the PayPal Website Payments Standard method. Other PayPal payment methods are set up in a similar manner.

### To set up payment by PayPal Website Payments Standard:

1. Your first step is to create a PayPal merchant account. Please check with PayPal (www.paypal.com) for detailed instructions.
2. In the Magento CE backend, select **System > Configuration > PayPal** to display the PayPal page, as shown in Figure 156.

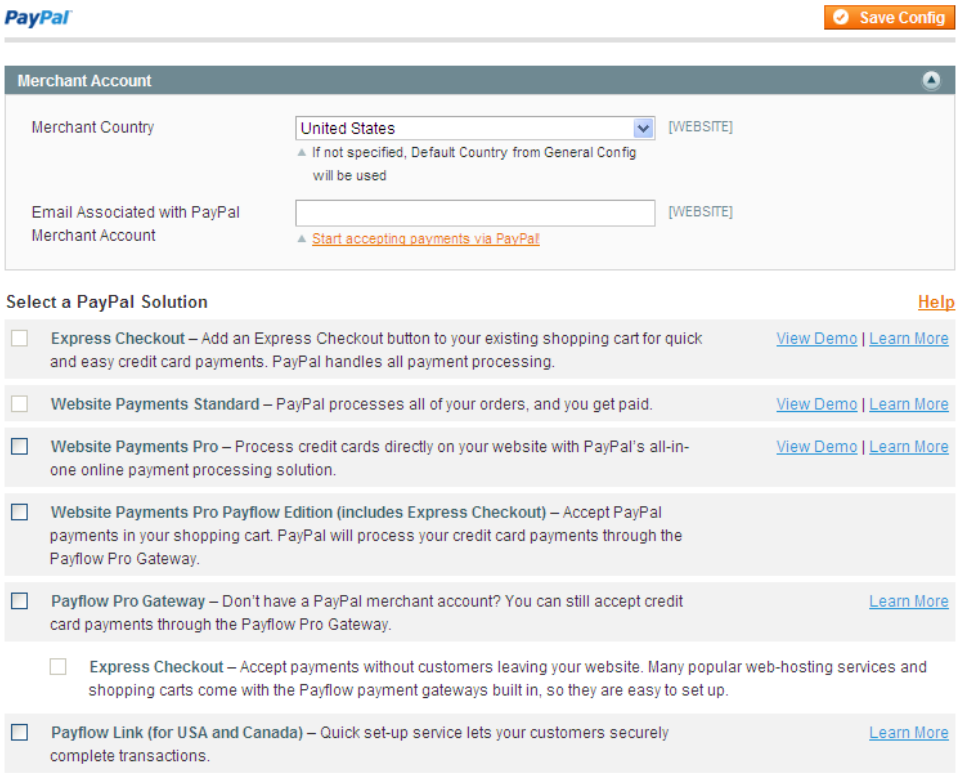

PayPal
Save Config
Merchant Account
Merchant Country
United States
[WEBSITE]
If not specified, Default Country from General Config will be used
Email Associated with PayPal Merchant Account
[WEBSITE]
Start accepting payments via PayPal
Select a PayPal Solution
Help
Express Checkout – Add an Express Checkout button to your existing shopping cart for quick and easy credit card payments. PayPal handles all payment processing.
View Demo | Learn More
Website Payments Standard – PayPal processes all of your orders, and you get paid.
View Demo | Learn More
Website Payments Pro – Process credit cards directly on your website with PayPal's all-in-one online payment processing solution.
View Demo | Learn More
Website Payments Pro Payflow Edition (includes Express Checkout) – Accept PayPal payments in your shopping cart. PayPal will process your credit card payments through the Payflow Pro Gateway.
Payflow Pro Gateway – Don't have a PayPal merchant account? You can still accept credit card payments through the Payflow Pro Gateway.
Learn More
Express Checkout – Accept payments without customers leaving your website. Many popular web-hosting services and shopping carts come with the Payflow payment gateways built in, so they are easy to set up.
Payflow Link (for USA and Canada) – Quick set-up service lets your customers securely complete transactions.
Learn More

Figure 156. PayPal Page

3. In the Merchant Account section, select the country and specify the email address that is associated with your PayPal merchant account.
4. Select the **Website Payments Standard** check box to display the **Website Payments Standard Settings** section, shown in Figure 157.

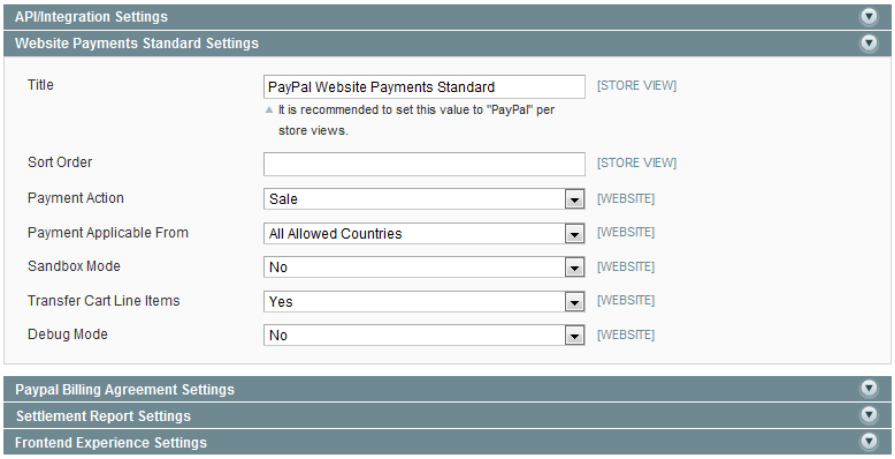



Figure 157. PayPal Website Payments Standard Settings

5. In the **Title** field, specify a title to be shown to your customers.
6. In the **Sort Order** field, specify an integer number to indicate where this payment method should appear on the list of available payments on the frontend. A value of 1 places this payment at the top of the list, a value of 2 places it second, and so on.

7. In the **Payment Action** field, select one of the following options:
   - **Authorization:** Blocks or holds funds in the PayPal account until these funds have been transferred to your account. This usually occurs when you process the Order.
   - **Sale:** Specifies that funds are transferred to your account immediately.
8. In the **Payment Applicable From** field, leave the **All allowed countries** selection or select **Selected Countries** to select from a list of countries.
9. In the **Sandbox Mode** drop-down list, select whether this payment method is in sandbox mode. Sandbox mode is used when you are setting up and testing the payment method; no actual payments are processed.
10. In the **Transfer Cart Line Items** drop-down list, select whether information about each individual line item in the order is sent to the payment processor (**Yes**), or only the order total (**No**).
11. In the **Debug Mode** drop-down list, select whether this payment method is in debug mode. Debug mode is used when there is a problem processing a payment and you want to know what data is being exchanged with PayPal and where the error is occurring. Data (except for credit card numbers) is stored in the system log file.
12. Click **Save Config**.

**Note:** This procedure includes only the basic setup items for this particular PayPal payment method. For information about other PayPal payment methods and configuration options, see http://www.magentocommerce.com/knowledge-base/entry/setting-up-paypal-for-your-magento-store.

# PayPal Advanced

The PayPal Advanced payment method is available for merchants in the United States only.

## General Concept

The PayPal Payments Advanced payment method passes the information about the card, entered by a customer, directly to PayPal; it is never stored in your Magento system. A customer does not need to have a PayPal account to use this method.

The PayPal Advanced payment method is not available for orders created from the Admin Panel.

## Configuring PayPal Payments Advanced

To use the PayPal Advanced method, you should have a PayPal Payments Advanced account on PayPal. You need to have a separate account for each website.

Configuring the PayPal Advanced method for each website is a two-step procedure for each website:

1. Set the options in the Magento Admin Panel.
2. Set the required options of the PayPal Payments Advanced account on the PayPal Manager website.

## Setting PayPal Payments Advanced Options in the Magento Admin Panel

### To configure the PayPal Advanced payment method in the Magento Admin Panel:

1. Log in to the Magento Admin Panel.
2. Navigate to **System** > **Configuration.**
3. Select the desired website from the **Current Configuration Scope** drop-down list in the upper-left corner of the page.
4. Under SALES in the left column, click **PayPal**. In the **Merchant Country** field select **United States**. If any other country is selected, the PayPal Payments Advanced settings are not displayed.
5. In the Select a PayPal Solution section, select the **PayPal Payments Advanced** check box to make the payment method settings available. When the check box is selected, the corresponding configuration field set appears. The following settings are available:
   - **Title**: In the **Title** field, specify the name of the payment method that will be displayed to customers in the Payment Information section of the one-page checkout. This parameter can be set up for each store view.
   - **Sort Order:** When deciding to use a number of payment methods, in the **Sort Order** field determine the sequence number of this method in the list of available methods in the Payment Information section of the one-page checkout.

     **Note:** The payment methods for which the sort order is not set are displayed first.

   - **Payment Action:** Choose what type of transaction is conducted when the order is placed, and the entities that will be created in the backend as a result. The following options are available:
     - **Authorization:** The payment is authorized and only an order is created in the backend of your store.
     - **Sale:** The payment is captured at PayPal's side, and as a result an order and an invoice are created in the backend of your store.
   - **Payment Applicable From:** Choose the countries from which customers can use this payment method. Choose between the following options:
     - **All Allowed Countries:** Customers from the default countries list can use this payment method.

    - **Specific Countries:** Only customers whose billing address includes one of the countries selected in the **Countries Payment Applicable From** field can use this payment method. The field basically works as a filter; so that this payment method will be listed for only those customers whose billing address is in one of these selected countries.

- **Debug Mode:** In the **Debug Mode** field, specify whether communications with the payment system will be written into the log file. The log file for PayPal Payments Advanced is *payments_payflow_advanced.log*.

6. In the **API/Integration Settings** field set configure the following:
    - In the **Partner**, **User**, **Vendor** and **Password** fields, specify your PayPal Payments Advanced account credentials.
    - **Test Mode**: The test mode helps testing the integration of Magento with the PayPal payment system. Transactions that are submitted while the account is in the test mode are not actually submitted to the credit card and electronic check processing networks, and credit card or bank accounts are not actually charged. Therefore, these transactions do not have valid transaction IDs. When you finish testing the integration project, the test mode must be turned off.
    - **Use Proxy**: Decide whether the proxy server is used for establishing the connection between Magento and the PayPal payment system. If you select **Yes**, two additional fields for specifying the proxy host and port are displayed.
7. Click **Save Config** in the upper-right corner of the page to save the settings.

## Setting the PayPal Payments Advanced Account Options on the PayPal Manager Website

### To make the necessary settings for the PayPal Advanced account, take the following steps:

1. Log in to https://manager.paypal.com/
2. Navigate **to Service Settings > Hosted Checkout Pages**. Options should be configured in the Set Up and Customize sections.
3. Configure the options according to the recommendations displayed in the **PayPal Payments Advanced** field set in the Magento Admin Panel.

## PayPal Payments Advanced Method: Customer Experience

A store customer selects the PayPal Payments Advanced payment method on the Payment Information checkout step and clicks **Continue**. The Order Review step appears, where the **PAY NOW** button is available instead of the usual **PLACE ORDER** button. After the customer clicks **PAY NOW**, the PayPal-hosted form opens in the customer's browser. The customer enters the card information and clicks **Verify Card**. If the transaction is successful, the customer is redirected to the order confirmation page.

**Note**: The form also contains the **Pay with PayPal** button; clicking it redirects a customer to the PayPal site, where the customer can complete the payment using PayPal Express Checkout.

If the transaction fails on any reason, an error message appears on the checkout page and the customer is directed to repeat the checkout process. These situations are handled on the PayPal side.

## Order Processing When the PayPal Advanced Payment Method Is Used

Processing of orders that are paid using the PayPal Payments Advanced payment method is the same to regular processing of orders that are paid with PayPal. An invoice, shipment, and credit memo (online/offline refund) can be created. Multiple online refunds are not available for the PayPal Payments Advanced payment method.

When PayPal Advanced is used, an order is created in the Admin Panel once a customer clicks **PLACE ORDER** on the Order Review step of the one-page checkout. The order status upon creation depends on the response the system receives from PayPal, and can be one of the following:

- **Processing**: The transaction was successful
- **Pending Payment**: The system did not receive any response from PayPal
- **Canceled**: The transaction was not successful for some reason
- **Suspected Fraud**: The transaction did not pass some of the PayPal fraud filters. The system receives the response from PayPal that the transaction is under review by Fraud Service.

# PayPal Express Checkout

Configuring the PayPal Express Checkout payment method is similar to setting up the other PayPal payment methods. For this reason, the details of the basic PayPal Express Checkout setup are not described here. However, there are two aspects of PayPal Express Checkout that you should be aware of when setting it up: Saving the customer's billing address, and Order transactions.

## Saving the Customer's Billing Address

Prior to version 1.11 of Magento Enterprise Edition and version 1.7 of Magento Community Edition, the PayPal Express Checkout payment method did not allow saving the complete billing address for the order in Magento. Starting with those versions this restriction has been removed and a complete billing address can be saved in a Magento order when the PayPal Express Checkout payment method is used by a customer. The billing address can be received from PayPal, and can be edited by the customer.

If you want to receive the billing address of a customer from PayPal for customers using the PayPal Express Checkout payment method, you need to take the following steps:

1. Enable the corresponding functionality is enabled in your PayPal merchant account. Contact the PayPal technical support for details.
2. In the Magento Admin Panel under **System** > **Configuration** > SALES > **PayPal** > **Express Checkout Settings** in the **Require Customer's Billing Address** field select **Yes,** and save the configuration. If you want to request customers billing address only for orders which contain downloadable and/or virtual products only, in the **Require Customer's Billing Address** field select **For Virtual Quotes Only**.

When customers choose to pay using PayPal Express Checkout, they are redirected to PayPal. Having logged in to PayPal and reviewed the payment information, they are redirected back to the store, to the Order Review page, where they choose the shipping method, edit the billing and shipping addresses and place the order.

**Note:** If a billing address cannot be received from PayPal because of your configuration or due to any other reasons, the billing address fields on the Order Review page are prepopulated with the shipping address values. A customer can edit themt if necessary.

Figure 158 illustrates the Order Review store page when a customer uses the PayPal Express Checkout payment method.

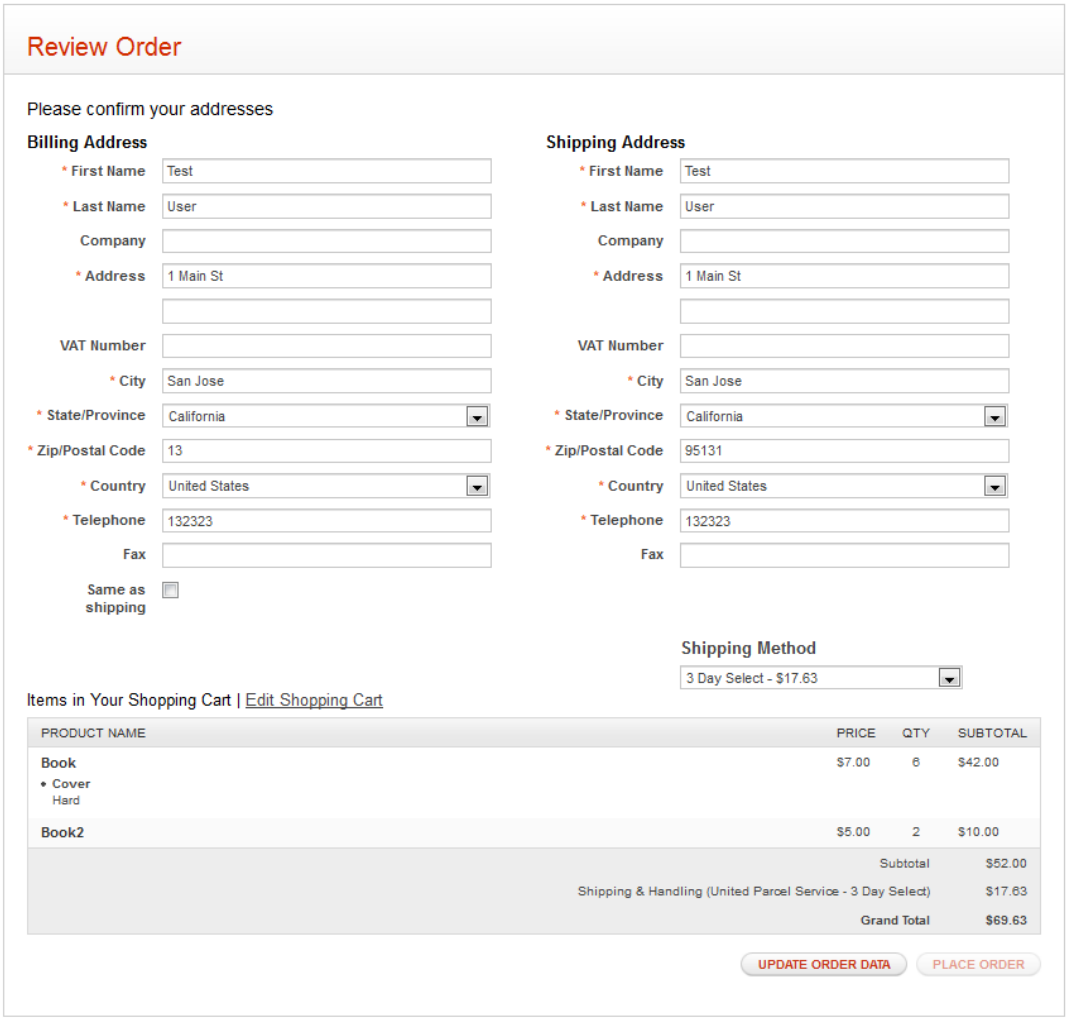



**Figure 158. The Order Review page when PayPal Express Checkout payment method is used.**

If a customer leaves the billing and shipping addresses without changes, the **PLACE ORDER** button is enabled when the customer selects the shipping method in the **Shipping Method** field.

If the customer edits the billing or shipping address, the **PLACE ORDER** button is disabled. The customer needs to click the **UPDATE ORDER DATA** button first. The system will update the information, including the available shipping methods, and the **PLACE ORDER** button will be enabled.

After the customer clicks **PLACE ORDER**, the order is created in Magento, and PayPal performs the related transaction(s). The complete billing and shipping addresses are saved in the order record in Magento.

## Order Transactions in PayPal Express

Magento includes the option of using a new payment action, "Order," for the PayPal Express Checkout payment method. When a store customer submits an order, having paid using the PayPal Express Checkout payment method, for which the Order payment action is set, the funds on the customer's card are authorized. If the authorization times out before you capture all payment, the authorization is voided, and a new authorization and capture are conducted when you create an invoice. Only the amount equal to the invoice total is authorized and captured. The maximum number of these authorizations for one order, and the periods for which the first authorization and the order in general stay valid, depend on your PayPal merchant account settings. These parameters need to be specified in the Magento Admin Panel as well. Capturing can be done only from the Magento Admin Panel, by creating one or more invoices.

Situations in which using the "Order" transaction may be appropriate include the following:

- Back orders, in which available items are sent immediately, and the remaining part of the order is sent when available; this may include more than two shipments
- Split orders, in which ordered items are sent in more than one shipment, perhaps to different addresses, and you want to collect a payment for each shipment
- Drop shipments, which are shipments from other vendors for which you accept the payment

Using the order payment action does not influence the checkout process for store customers.

## Configuring the Payment Action for the PayPal Express Checkout

### To change the payment action settings for the PayPal Express Checkout payment method:

1. In the Magento Admin Panel, select **System** > **Configuration** > SALES > **PayPal**. Configuration can be done either on the global or website level, so in the **Current Configuration Scope** drop-down list located in the upper left part of the page, leave **Default Config** or select the desired website.
2. In the **Express Checkout Settings** field set, in the **Payment Action** drop-down menu, select **Order**.
3. Configure these additional settings, which correspond to settings in your PayPal merchant account:

- **Authorization Honor Period (days):** Defines how long the primary authorization stays valid. The value should be equal to the corresponding value in your PayPal merchant account. The default value in your PayPal merchant account is 3. To increase this number you need to contact PayPal. The authorization becomes invalid at 11:49 p.m., U.S. Pacific Time, of the last day.
- **Order Valid Period (days):** Defines how long the order remains valid. When the order becomes invalid, you can no longer create invoices for it. Specify the value equal to the Order Valid Period value in your PayPal merchant account. The default value in your PayPal merchant account is 29. To change this number, you need to contact PayPal
- **Number of Child Authorizations:** Defines the maximum number of authorizations for one order. That is, the maximum number of the online partial invoices you can create for one order.
  The number in this field should be equal to the corresponding setting in your PayPal merchant account. The default number of child authorizations in your PayPal account is 1. To increase this number, you need to contact PayPal.

4. Click **Save Config** in the upper-right corner of the page to save the new configuration.

## Managing Orders Paid Using PayPal Express Checkout with Payment Action Set to Order

When the store customer submits the order, having paid using the PayPal Express Checkout payment method, for which the "Order" payment action is set, the order (with Processing status) is created in the Admin Panel. Two transactions are created for this order: one with type **Order** and one with type **Authorization**. See Figure 159.

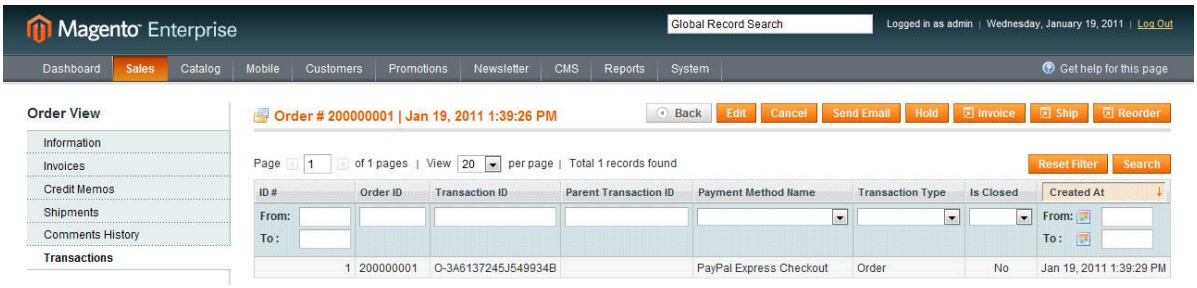



**Figure 159. Order transaction for PayPal Express Checkout**

The funds on the customer's account are put on hold, and you can capture the payment only from the Magento Admin Panel. To capture, you need to create an online invoice. Once you choose to create an online invoice, Magento determines whether the number of days passed from the first authorization exceeds the **Order Valid Period** value. If more days have passed, you cannot create an online invoice for this order.

If the order is valid, Magento determines whether the first authorization is valid, comparing the number of days passed with the **Authorization Honor Period** value. If the authorization is valid, the necessary sum is captured; the rest is left on hold, and the number of captures is not limited. If the authorization is not valid anymore, it is voided. A new authorization and capture are created, but for the invoice total (not the order total). From this moment, each time you create an online invoice for this order, a new authorization and capture will be conducted only for invoices totals.

Also, Magento will determine whether the number of the conducted captures is equal to the **Number of Child Authorizations** value each time. If the number specified there is already reached, creating online invoices for the order will not be possible.

If you click the **Void** button on the order view page, the Order transaction is voided. After this, no online invoice can be created for the order.

**Note**: PayPal provides an option of capturing an amount larger than was ordered. However, this option is not supported in Magento.

# Other Payment Methods

### To define payments methods:

1. In the Admin Panel, select **System > Configuration > Payment Methods** to display the Payment Methods page, as shown in Figure 160.

**Figure 160. Payment Methods**

A few payment options are described as follows.

## Saved Credit Cards

This option enables you to take credit cards and to process them offline. This method is useful when you have a card terminal in a brick and mortar store or have access to a virtual terminal. This payment method is enabled by default in the Sample Data.

**Tip:** When using the Credit Cards payment method it is highly recommended to configure an SSL certificate for your web store.

**Note:** Saving customer card data is discouraged unless absolutely necessary. Even though the data is encrypted it still poses a security risk to hold this information.

## To set up the Saved Credit Cards payment method:

1. Select **System > Configuration > Payment Methods** to display the Payment Methods page.
2. In the **Current Configuration Scope** drop-down list, select the scope for these configuration selections.
3. Expand the **Saved CC** section to define credit cards, as shown in Figure 161.

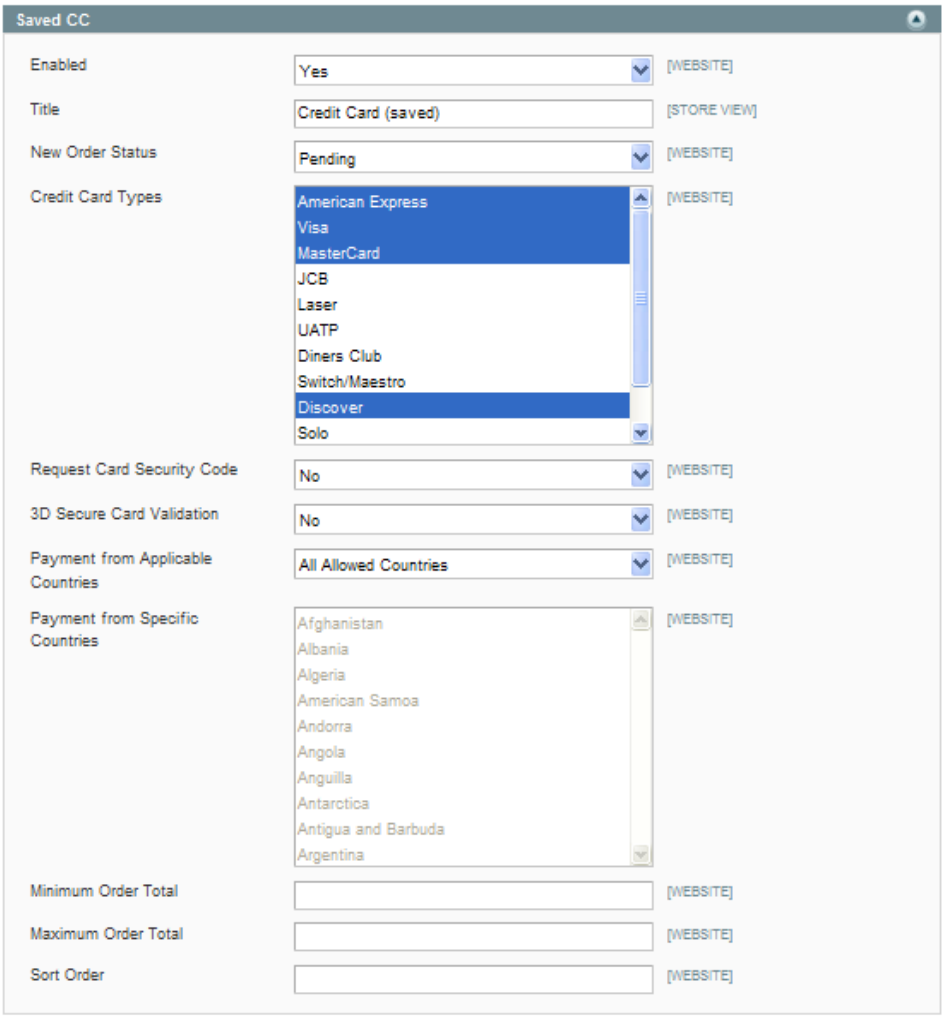



Figure 161. Saved Credit Card Configuration Options

4. Make your configuration selections. Most of these options are self-explanatory. The options that may need some explanation are as follows:

- **Request Card Security Code:** Determines whether the payment method interface on the frontend requires the customer to supply the security code on the back of the card. If your credit card terminal requires the security code, set this option to **Yes**.
- **3D Secure Card Validation:** Determines whether credit card validation is carried out using the 3D Secure system. You must be a 3D Secure system subscriber, and you must first set up the general 3D Secure configuration options in **System > Configuration > Payment Services**.

5. Click **Save Config** to save your changes.

This option appears in the web store as shown in Figure 162.

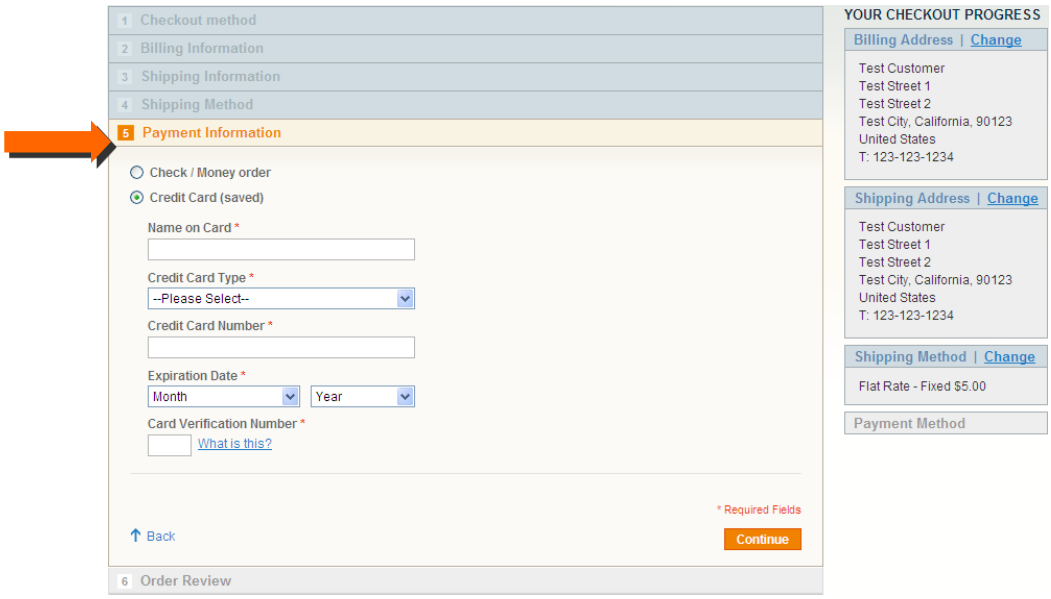



Figure 162. Saved Credit Card Payment Method (Frontend)

Customers who place an order in your web store and use the Saved Credit Card payment method see their card details as shown in Figure 163.

Payment Information
Name on the Card: FirstName LastName
Credit Card Type: Visa
Credit Card Number: 4111111111111111
Expiration Date: 12/2010
Order was placed using USD

Figure 163. Credit Card Information (Frontend)

**Tip:** You can use the following test credit card number to test the payment methods in your web store:
**Visa 4111111111111111**
**MasterCard 5555555555554444**
**American Express 378282246310005**
Use any expiration date in the future, and for the CVV/CVC/verification code, use **123** or **000**.

## Checks and Money Orders

This payment method enables you to accept paper checks and money orders as payment. The order remains in Pending status until the payment is received (or clears your bank, if you prefer).

This payment method is enabled by default in the Sample Data. Expand the **Check/Money Order** section to define how checks and money orders are accepted in your web store, as shown in Figure 164.

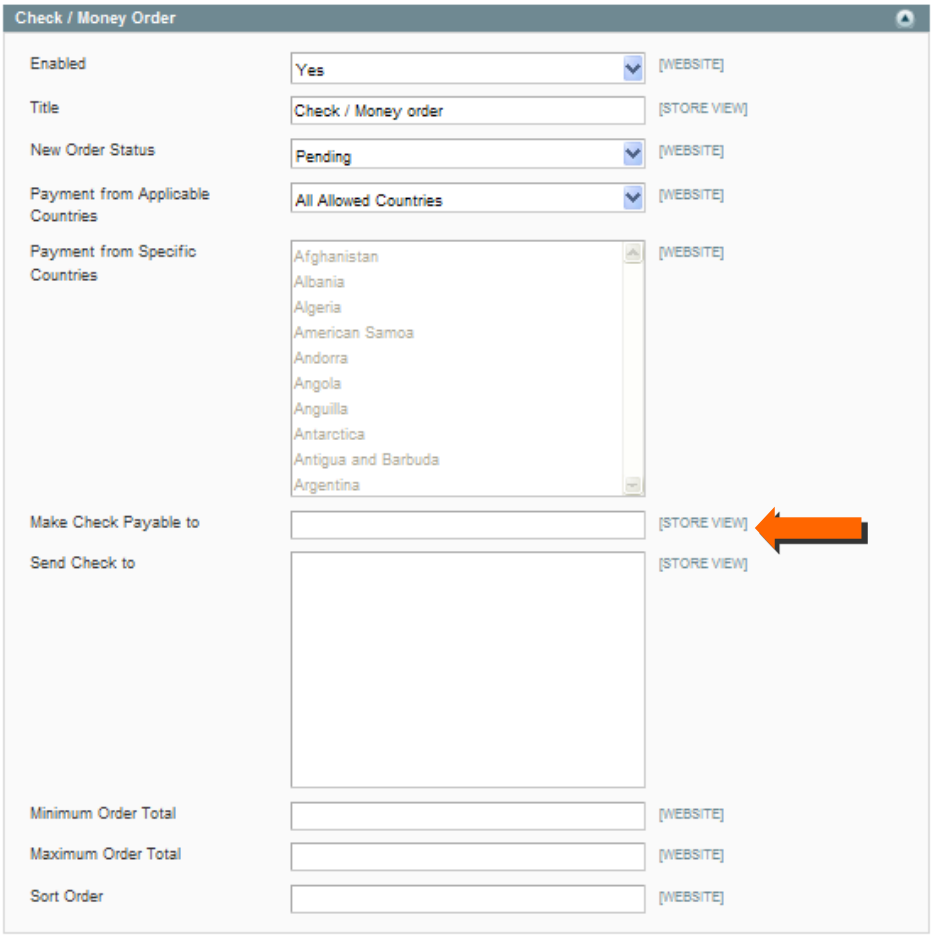



Figure 164. Check/Money Order Configuration Options

In the **Make Check payable to** field, specify the name of the entity to which the checks must be made out.

This option appears in the web store as shown in Figure 165.

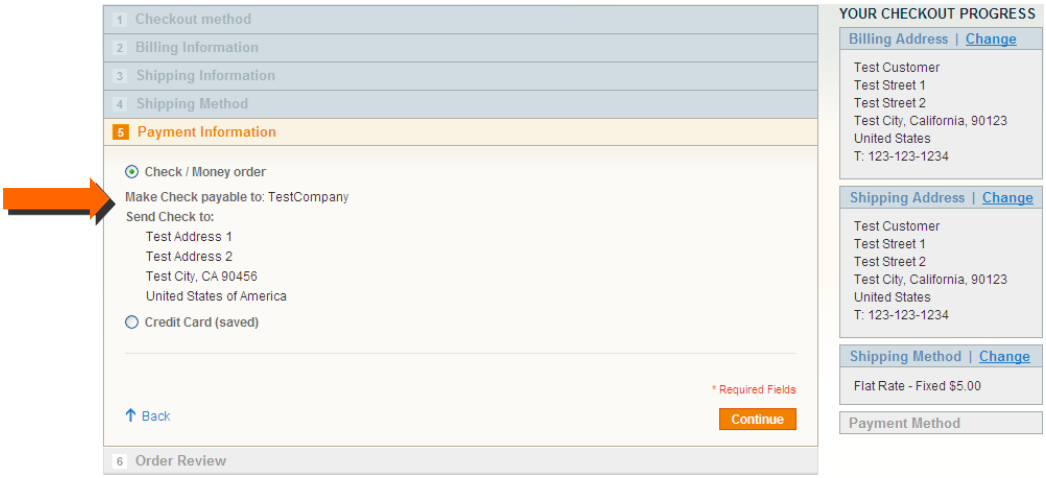



Figure 165. Check/Money Order Payment Method (Frontend)

## Other Payment Methods

There are numerous other payment methods available in the backend, and others can be obtained from Magento Connect (http://www.magentocommerce.com/magento-connect).

Most of the configuration options for these payment methods are similar to the options described in this chapter. Other configuration options are specific to each payment method, and you should consult the information you received when you subscribed to a given payment method to understand how these options work.

# 11 Design and Content

This chapter describes how to customize the look-and-feel of your web store by applying easy to use options that are provided in the Magento backend.

## Overview

Magento provides a variety of simple-to-use design options that enable you to apply your own customized look-and-feel to your Magento web store with basic HTML knowledge.

**Tip:** See http://www.magentocommerce.com/design_guide for a description of how interfaces, themes, skins, layouts and blocks are used and to gain access to resources that will assist in their implementation.

## Terminology

Following are some of the terms you should be familiar with when customizing the design of your store:

**Block:** A Magento CE feature that modularizes page elements for easier management.

**Content block:** Block that produces content, such as the content of a category list, mini cart, or product list. See also **Structural block**.

**Content Management System (CMS)**: A Magento CE feature that stores pages or parts of pages that you can use in your store.

**Layout**: File that maps content blocks to structural blocks. More than one content block can be mapped to a single structural block.

**Skin file**: File that define the visual functional specifications of page elements, such as text, graphics, and the logic behind buttons and other controls.

**Structural block**: Block created for the sole purpose of assigning visual structure to a store page; for example, header, footer, left column, main column.

**Template:** A collection of XML and other files that define the block structure and logic for visual presentation.

**Theme**: a collection of templates and skin files that control the visual elements of your store. These visual elements are applied to all pages in your store, giving your store a consistent look and feel throughout.

# Changing the Web Store's Theme

When you first install Magento CE, the design elements of your store are based on the Default Theme. You can modify this theme, add themes created by others, or create new themes from scratch.

**Tip:** To design your own theme, see the Magento Designers Guide at http://www.magentocommerce.com/design_guide

## To add and activate a theme in your store:

1. Go to the Magento Connect site (http://www.magentocommerce.com/magento-connect). This site contains hundreds of extensions, which are add-ons to Magento software that can extend or enhance the look or functionality of your store. New ones are uploaded often.
2. Click on the **Core** link to select one of the free extensions provided by Magento. The extensions are listed in the center of the page, as shown in Figure 166.

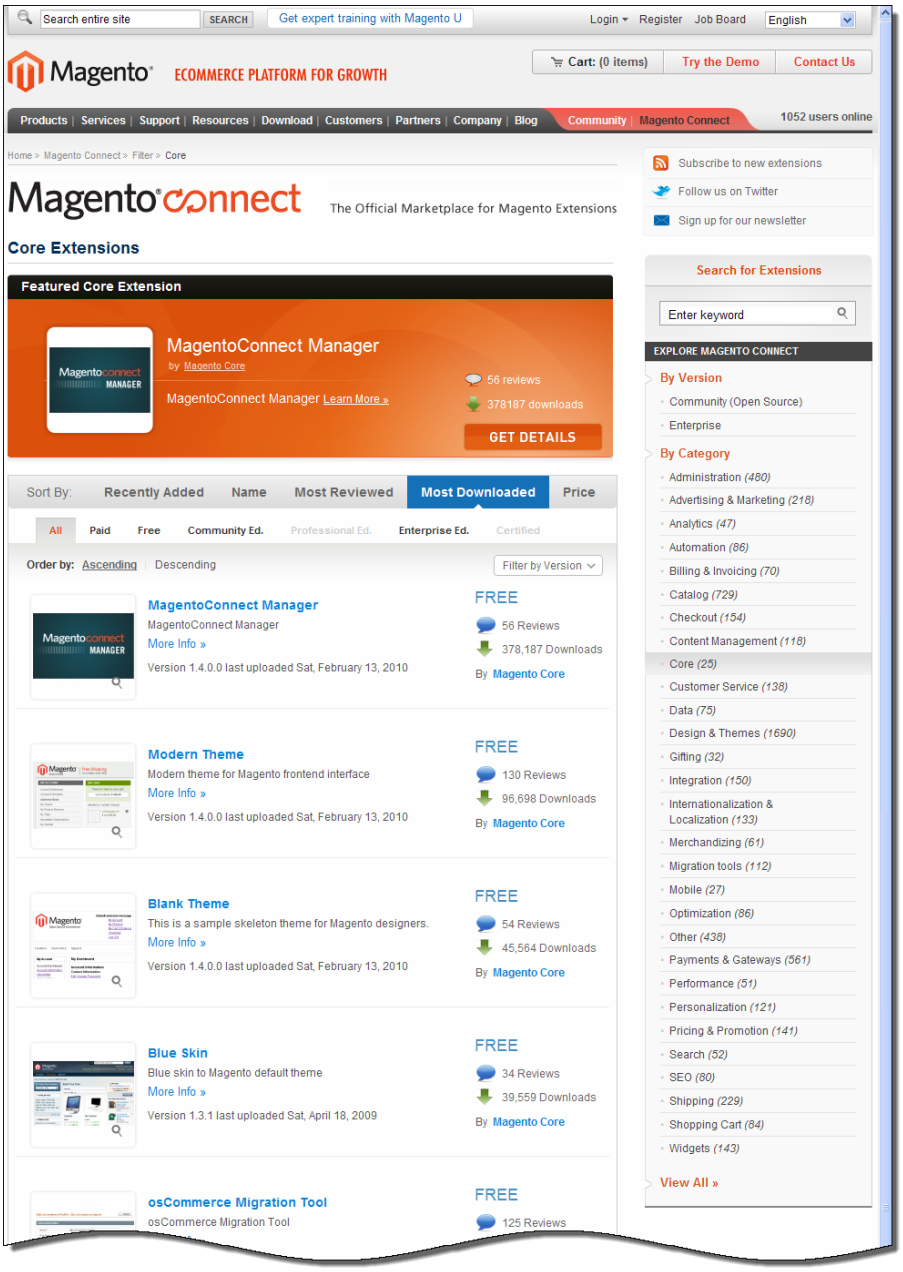



Figure 166. Magento Connect

3. This example demonstrates the implementation of the Modern Theme. Scroll down the list of extensions and select the **Modern Theme**.

4. Install the theme as you would any other Magento extension. See "Extending Magento," page 252, for more information.

5. You can now activate this theme so that the web store appears with a new layout. Select **System > Configuration > Design** and expand the **Themes** section. The Design page is displayed, as shown in Figure 167.

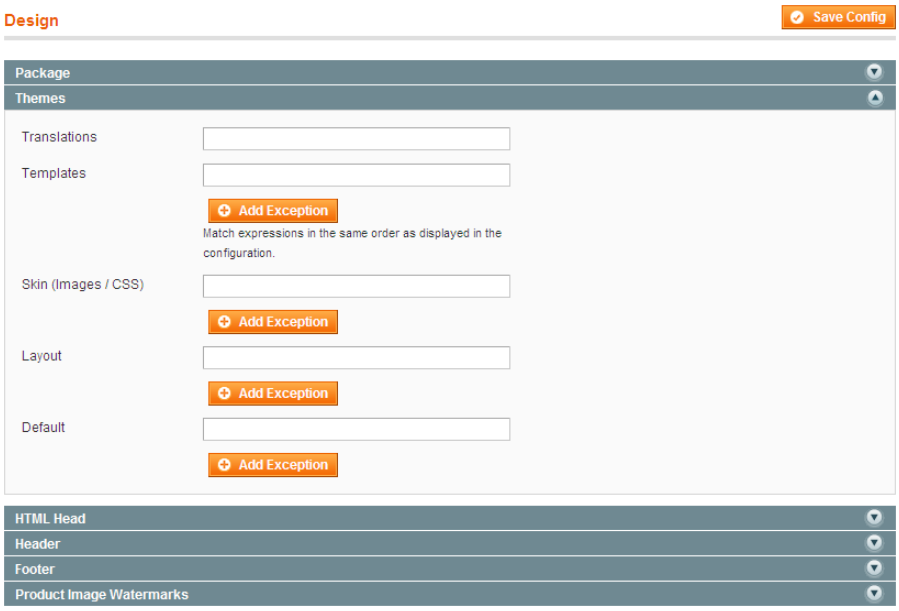



Figure 167. Design Page

**Tip:** The **Add Exception** option enables you to define special themes displayed for users using specific browsers. An example is showing an iPhone optimized theme for users using this device to browse the store.

6. In the **Default** field, specify the name of the theme. In this example it is called **Modern**.
7. Click the **Save Config** button on the top right of the page. The header, footer, menu bar, and background of the frontend now look different according to the new theme.
8. If your home page appears incorrect, it may be because the layout that you selected is suited to two columns when your home page has one column or vice versa. For the **Modern** theme, the following change must be applied so that that the frontend home page appears properly. From the top menu bar in the Admin Panel, select **CMS > Pages** to display the Manage Pages page, as shown in Figure 168.

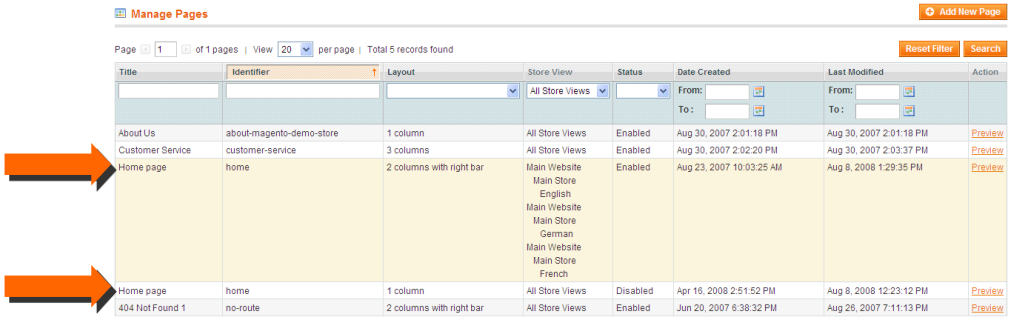



Figure 168. Manage Pages Page

This page shows two Home Page rows:

- One row has the value **2 columns with right bar** in its **Layout** column and its **Status** column shows **Enabled**.

- The other row has the value **1 column** in its **Layout** column and its **Status** column shows **Disabled**.

9. Click on the first and second rows of the homepage. The page shown in Figure 169 is displayed for each of them.

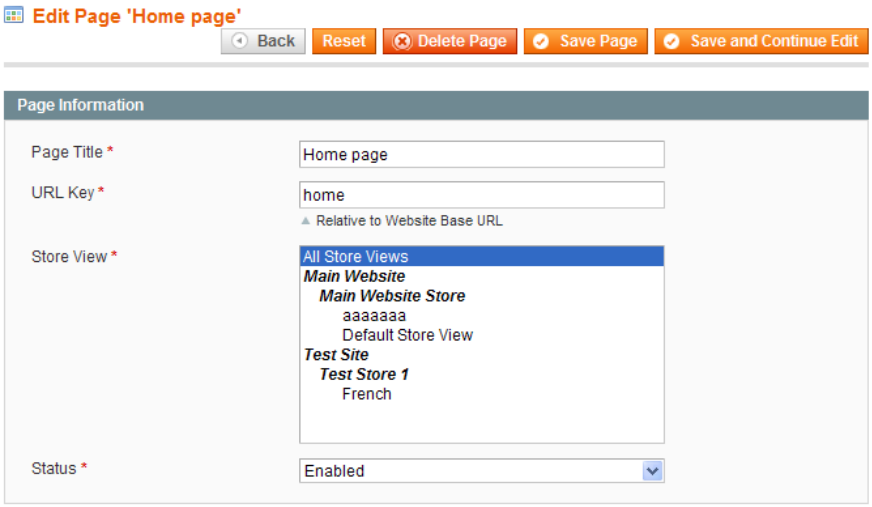



Figure 169. Edit Page Page

- Change the **Enabled** status of the page with **2 columns with right bar** layout to **Disabled**.
- Change the **Disabled** status of the page with **1 column** layout to **Enabled**. The homepage of the frontend now appears similar to the page shown in Figure 170.

Magento
DEMO STORE
Free Shipping
on orders over $50
FURNITURE
ELECTRONICS
APPAREL
Your Language: English
Default welcome msg!
My Account
My Wishlist
My Cart (1 item)
Checkout
Log In
Search
Search entire store here...
GO
SPRING SALE!
Happening through August
Special Savings
Olympus Stylus 750
Buy 1 for $161.94 /ea
Buy 2 for $140 /ea
Buy 3 for $120 /ea
Buy 4 for $110 /ea
Buy $50 and get FREE SHIPPING on your entire order!
TAKE ADVANTAGE OF THE SUNSHINE!
GET INTO THE GROOVE!
NEW Sadals
NEW Tank Tops
T-Shirts
Cargo Pants
Shorts
NEW Swimsuits
Head over to Womens
Find out how you can help!
Every year Magento Demo Store sponsors national scholarships for students who will otherwise be unable to fulfill their academic potentials.
Find out how you are helping to build a bright future by purchasing from Magento Demo
GEAR UP FOR THE SPRING SEASON AND SAVE BIG!
SHOES
ACCESSORIES
APPAREL
FUNITURE
About Us | Customer Service | Site Map | Search Terms | Advanced Search | Contact Us
Newsletter Sign-up:
Enter your email address
SUBMIT
Help Us to Keep Magento Healthy - Report All Bugs (ver. 1.2.1)
© 2008 Magento Demo Store. All Rights Reserved.
We're available 24/7. Call us now.
(555) 555-0123
Holiday hours may apply.
FALL 2008
REQUEST A CATALOG!
Stock up on our latest deals and savings

Figure 170. Frontend Home Page With New Theme

# Managing CMS Pages

Content Management System (CMS) pages are static pages such as your **Homepage**, **About Us** and **Customer Service** pages that provide information about the web store and are managed through the Backend panel. CMS Pages are full pages that are available via their own URL addresses. Static Blocks are sections of code or graphics that can be referenced inside CMS pages as well as Category landing pages. They are page elements that can be reused and referenced throughout your site.

The following example shows how to create a new page in Magento CE and then how to create a link to it from your store footer.

## To add a CMS page:

1. Select **CMS > Pages** to display the list of currently defined CMS pages as shown in Figure 168.
2. Click the **Add New Page** button on the top right of the page to display the New Page page, as shown in Figure 171.

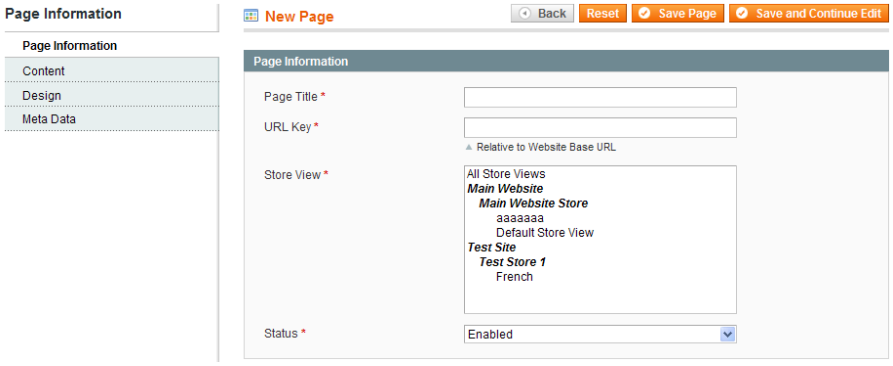



**Figure 171. New Page Page**

3. In the **Page Title** field, specify the words to appear in the browser's title bar.
4. In the **URL Key** field, specify the unique identifier to be used in the URL. It must contain all lower case letters and no spaces. The following example uses `our_history`.
5. Leave the default value in the **Store View** field.
6. In the **Status** field, select **Enabled**.
7. Click **Content** in the left navigation bar. Use the WYSIWIG editor to define the content for this page.
8. Click **Design** in the left navigation bar to open the design options, as shown in Figure 172.

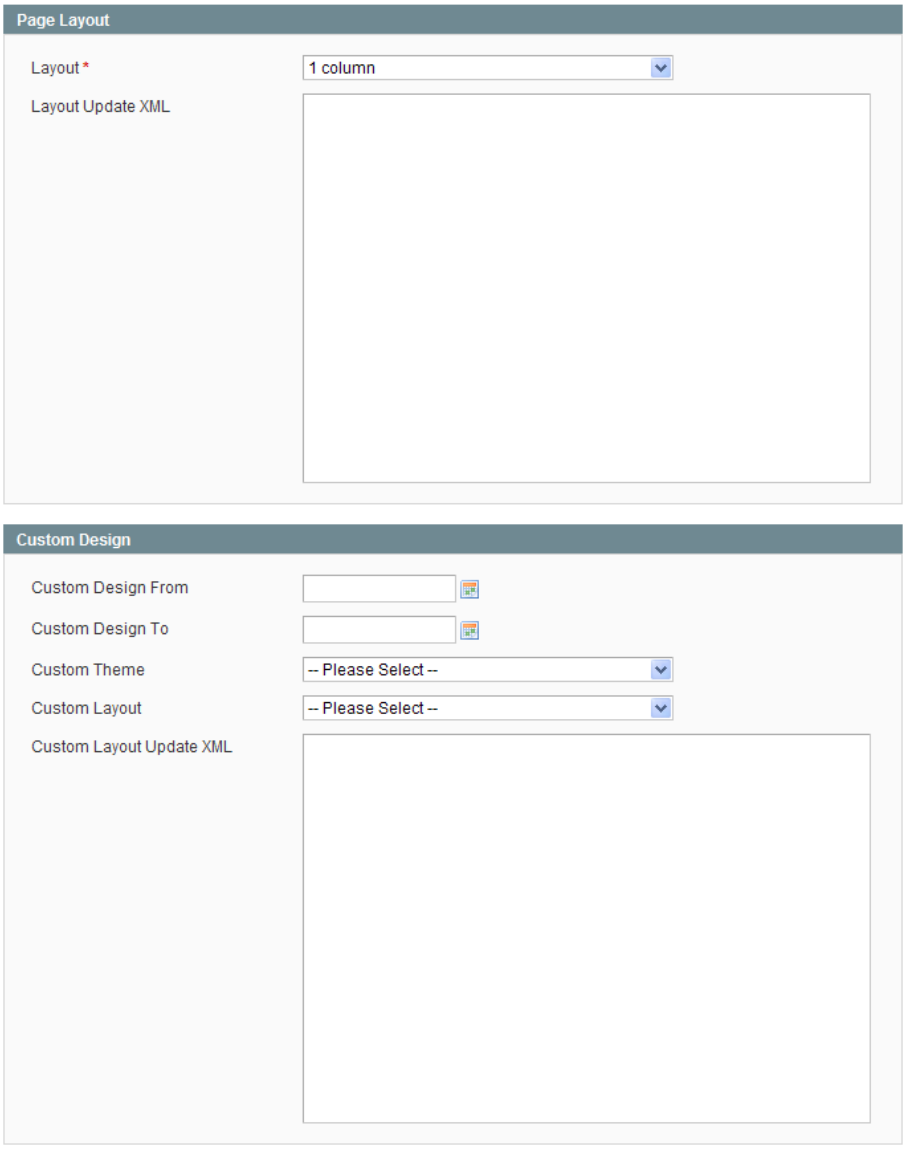



Figure 172. Custom Design Options

9. Click the **Layout** field and then select one of the following options:
   - **Empty:** Shows the content of an empty page with no header, footer or side bars.
   - **1 Column:** Displays all the content entered in a single central column with a header and footer.
   - **2 Columns with left/right bar:** Displays all the content entered on the page with a header, footer and left/right bar.
   - **3 columns:** Displays both the left and right columns from the design package with the content shown between.
10. Click **Save Page**. You can now open a browser and browse to this Landing page. The URL is taken from the value that you specified for **URL Key**, as described above. For example: `/our_history` is added to the web store's URL.

11. The following steps show how to add a link to this page from the frontend's footer. Select **CMS > Static Blocks** option to display the list of existing Static Blocks.

12. Click on the **Footer Links** row to display the definition of the frontend's footer.

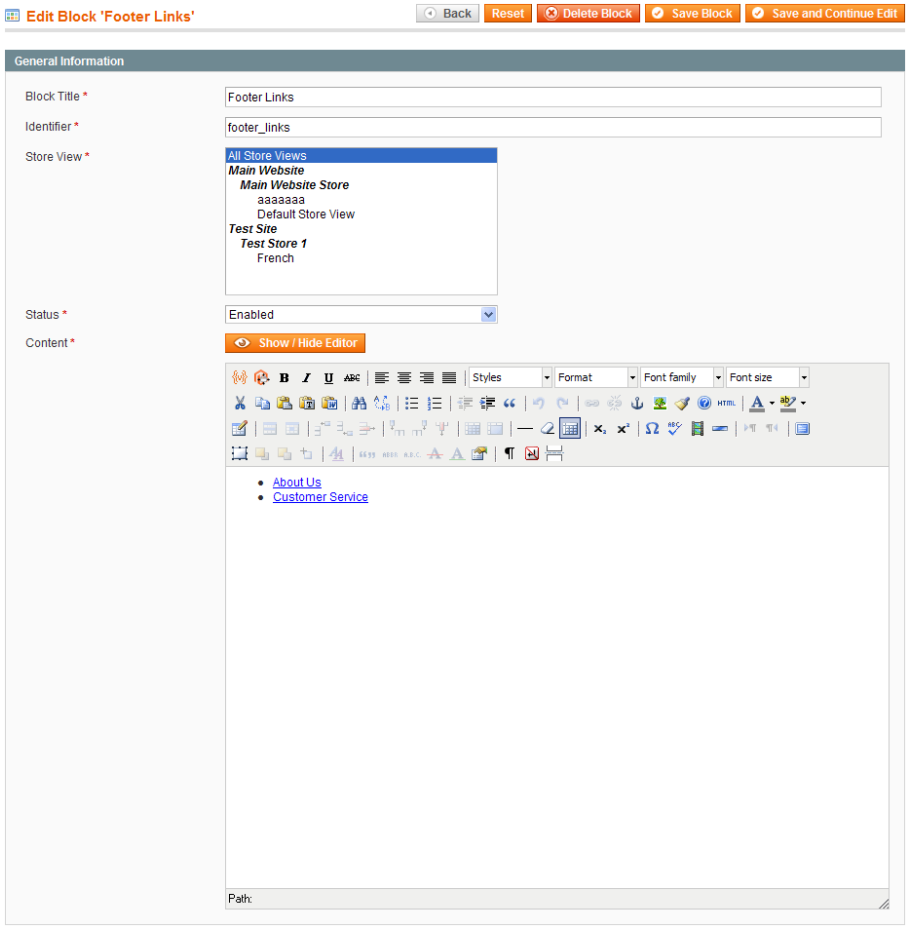



**Figure 173. Editing a Static Block**

13. In the **Content** field, use the WYSIWYG editor to add a link to the new page. You can do this by pressing ENTER after one of the existing links, typing the link text, selecting this text, and clicking the Link icon ( ). Use the Insert/Edit Link dialog box to specify the link attributes, as shown in Figure 174.

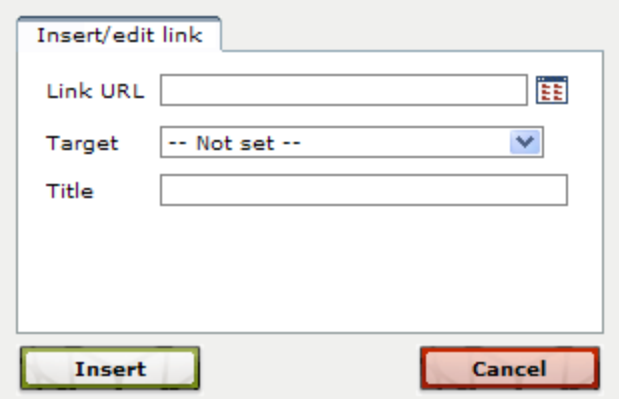



Figure 174. Insert/Edit Link Dialog Box

The footer of the frontend now appears as shown in Figure 175.

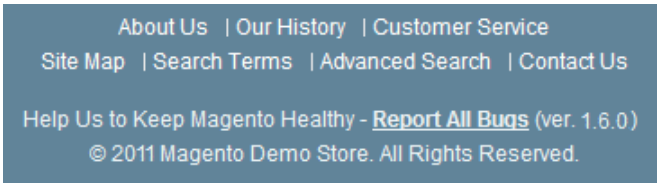

About Us | Our History | Customer Service
Site Map | Search Terms | Advanced Search | Contact Us
Help Us to Keep Magento Healthy - Report All Bugs (ver. 1.6.0)
© 2011 Magento Demo Store. All Rights Reserved.

Figure 175. Updated Footer Block

# Customizing Transactional Emails

Transactional Emails are all emails sent from a Magento CE store. Magento CE offers flexible, easy-to-use functionality to enable you to customize these emails and translate them into multiple languages to best use them for communication with your customers.

This section describes how to modify the emails that are sent from the web store, for example, when an account is created or an order is placed.

## To customize a transactional email template:

1. Select **System > Transactional emails** to display a list of the custom email templates created in this web store.

   **Note:** This page shows only customized emails. If this page is empty, it means that Magento will only send standard default emails.

2. Click the **Add New Template** button to display the New Email Template page.

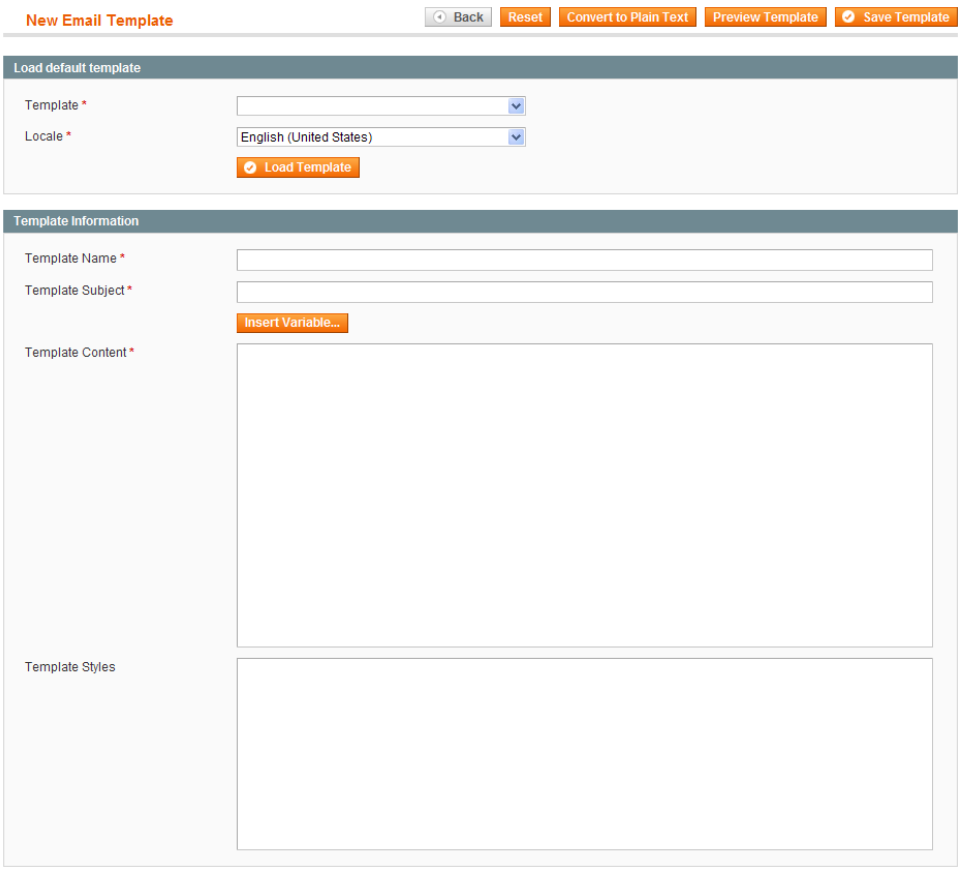



Figure 176. New Email Template Page

3. In the **Template** field, select the name of one of the transactional emails that you want to customize, such as **New account**.
4. In the **Locale** field, select the language.
5. Click **Load Template**.
6. In the **Template Name** field, specify a name for the customized email template.
7. If desired, modify the **Template Subject** field.
8. In the **Template Content** area, use the WYSIWIG editor to modify the content. You must change the contact phone number and email address as well as the logo image reference at the top of the page to reflect your own store information in all active templates.
9. Click the **Save Template** button.
10. Now that your customized email template is ready and available, the next step is to inform Magento CE that it should use this template to send email to customers instead of the default template. This is controlled in various configuration sections depending on the type of email.

In our example of customizing a New Account email, select **System** > **Configuration** > **Customers** > **Customer Configuration**. Then expand the **Create New Account Options** section and select your newly customized transactional email in the **Default Welcome Email** field.

# 12 Promotions

This chapter describes a variety of ways to promote your products.

## Overview

Magento CE features a variety of ways to promote your products. These include options for presenting additional products in order to increase conversion rates and for providing various discounts and promotions. The possibilities are endless!

## Up-selling, Related Products, and Cross-selling

Three types of product promotion selling options are provided in Magento CE: Up-sell products, Related products, and Cross-sell products.

- **Up-sell Products:** When a customer views a product, the Up-sells for this product are items that your customer could buy *instead* of the product that is being viewed. These products may be of a better quality, more expensive, or more popular, or produce a higher profit margin. These products appear on the Product Information page.
- **Related Products**: Related products appear in the Product Information page in the right column. Related products are meant to be purchased in addition to the item the customer is viewing.
- **Cross-sell Products:** Products that are promoted in the shopping cart page right before checkout. When a customer navigates to the shopping cart (whether automatically after adding a product or otherwise), these products are offered as suggestions in addition to the products already in the shopping cart. They are similar to impulse buys, like magazines and candy at the cash registers in grocery stores.

## Up-Sells

The up-sell products appear in the Product Information page under the **Product Description**, as shown in Figure 177. This example presents a more expensive keyboard and other products as up-sells to the less expensive keyboard.

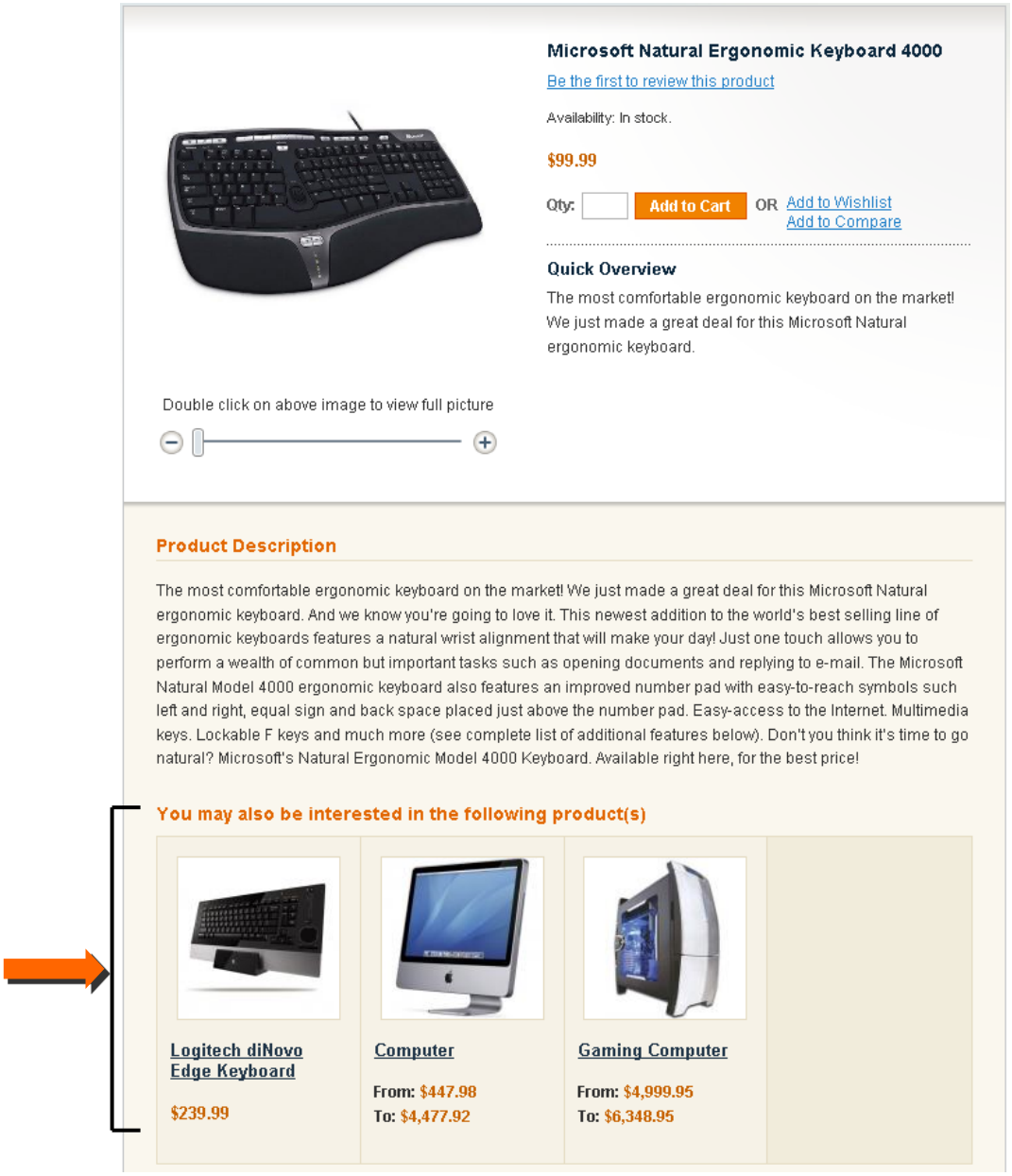

Microsoft Natural Ergonomic Keyboard 4000
Be the first to review this product
Availability: In stock.
$99.99
Qty:
Add to Cart
OR
Add to Wishlist
Add to Compare
Quick Overview
The most comfortable ergonomic keyboard on the market! We just made a great deal for this Microsoft Natural ergonomic keyboard.
Double click on above image to view full picture
Product Description
The most comfortable ergonomic keyboard on the market! We just made a great deal for this Microsoft Natural ergonomic keyboard. And we know you're going to love it. This newest addition to the world's best selling line of ergonomic keyboards features a natural wrist alignment that will make your day! Just one touch allows you to perform a wealth of common but important tasks such as opening documents and replying to e-mail. The Microsoft Natural Model 4000 ergonomic keyboard also features an improved number pad with easy-to-reach symbols such left and right, equal sign and back space placed just above the number pad. Easy-access to the Internet. Multimedia keys. Lockable F keys and much more (see complete list of additional features below). Don't you think it's time to go natural? Microsoft's Natural Ergonomic Model 4000 Keyboard. Available right here, for the best price!
You may also be interested in the following product(s)
Logitech diNovo Edge Keyboard
$239.99
Computer
From: $447.98
To: $4,477.92
Gaming Computer
From: $4,999.95
To: $6,348.95

Figure 177. Up-Sell Products

### To add Up-sells to a product:

1. In the Admin Panel select **Catalog > Manage Products** to display a list of products, as shown in Figure 178.

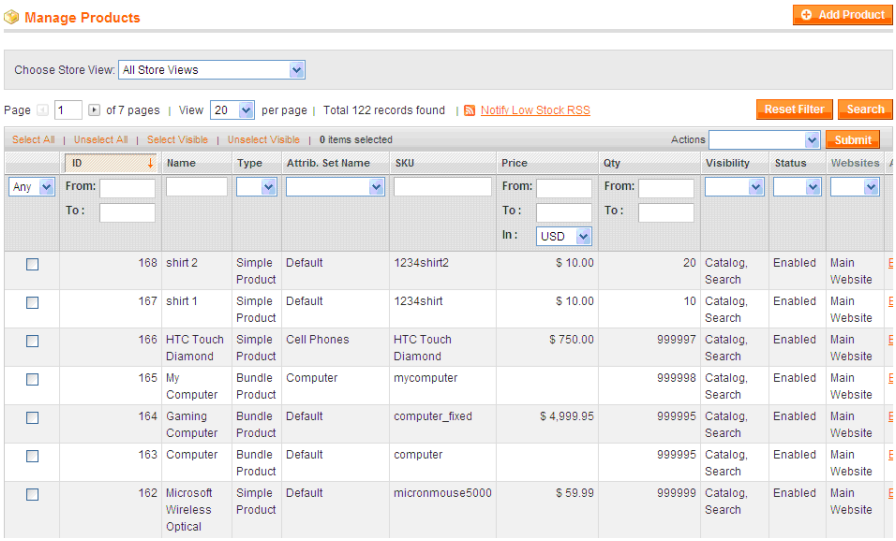

Manage Products
Add Product
Choose Store View: All Store Views
Page 1 of 7 pages | View 20 per page | Total 122 records found | Notify Low Stock RSS
Reset Filter
Search
Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected
Actions
Submit
ID
Name
Type
Attrib. Set Name
SKU
Price
Qty
Visibility
Status
Websites
168 shirt 2 Simple Product Default 1234shirt2 $ 10.00 20 Catalog, Search Enabled Main Website
167 shirt 1 Simple Product Default 1234shirt $ 10.00 10 Catalog, Search Enabled Main Website
166 HTC Touch Diamond Simple Product Cell Phones HTC Touch Diamond $ 750.00 999997 Catalog, Search Enabled Main Website
165 My Computer Bundle Product Computer mycomputer 999998 Catalog, Search Enabled Main Website
164 Gaming Computer Bundle Product Default computer_fixed $ 4,999.95 999995 Catalog, Search Enabled Main Website
163 Computer Bundle Product Default computer 999995 Catalog, Search Enabled Main Website
162 Microsoft Wireless Optical Simple Product Default micronmouse5000 $ 59.99 999999 Catalog, Search Enabled Main Website

Figure 178. Manage Products Page

2. Click the **Edit** link which appears on the right side of the row of the product for which you want to define Up-sells. The page shown in Figure 179 is displayed:

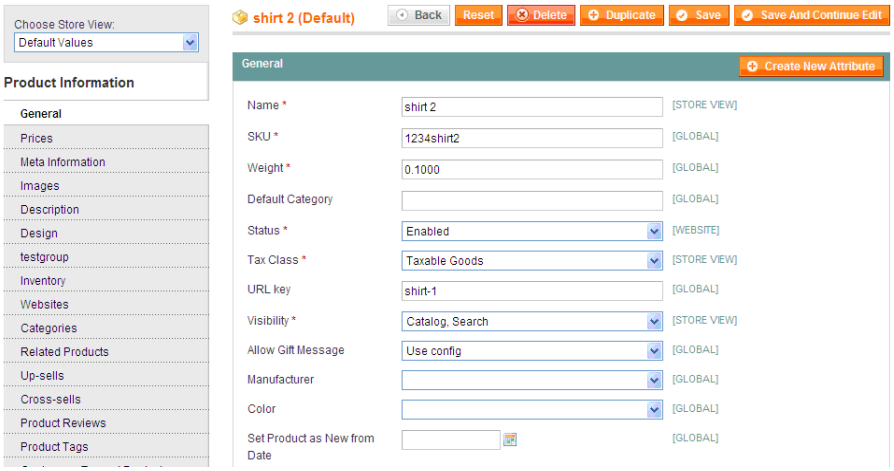



Figure 179. Edit Product Page

3. Select the **Up-sells** tab in the panel on the left.

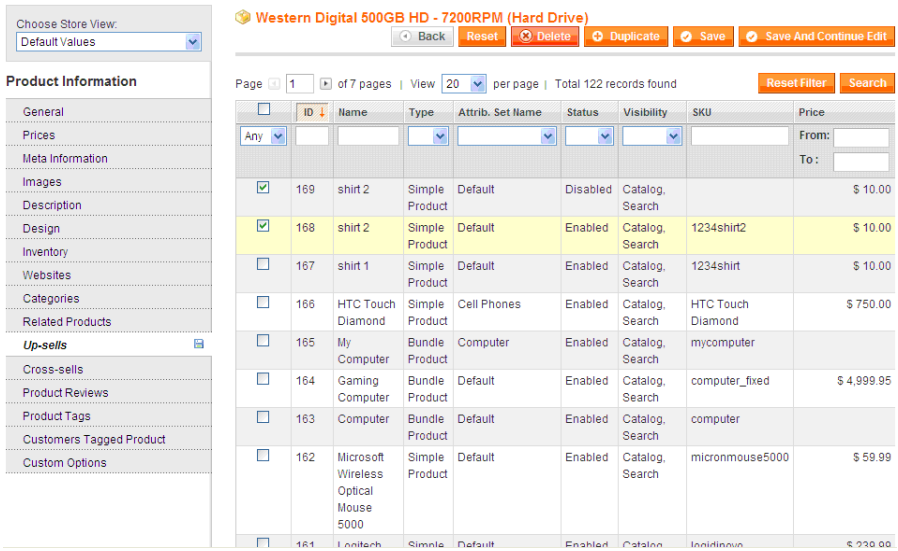



Figure 180. Products Selected as Up-Sell Products

**Tip:** By default the list shows only products that were already selected as up-sells. If there are none or you want to add other products, click the **Reset Filter** button to display a list of all the products.

4. Use the check box in each row or the products that you want to appear as up-sells to this product.
5. Click the **Save** button.

## Related Products

Related Products are shown in the right column of your web store in a separate block. The example in Figure 181 shows a mouse product that was added as a Related Product for a keyboard purchase.

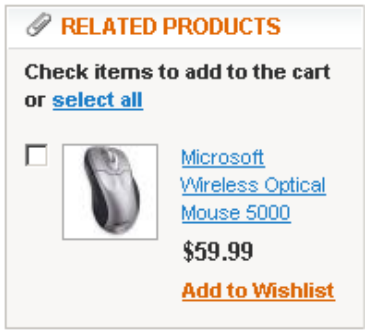

RELATED PRODUCTS
Check items to add to the cart or select all
Microsoft Wireless Optical Mouse 5000
$59.99
Add to Wishlist

Figure 181. Related Item

### To add Related Products to a product:

1. In the Admin Panel, select **Catalog > Manage Products** to display a list of products.
2. Click the **Edit** link that appears on the right side of the row of the product for which you want to define Related Products.

3. Select the **Related Products** tab in the panel on the left to display the Product Listing page.

   **Tip:** By default the list shows only products that were already selected as Related Products. If there are none or you want to add other products, click the **Reset Filter** button to display a list of all the products.

4. Use the check box in each row of the products that you want to appear as Related Products to this product.
5. Click the **Save** button.

## Cross-sells

Cross-sell products are shown in a block below the shopping cart products, as shown in Figure 182.

Based on your selection, you may be interested in the following items:
19" Widescreen Flat-Panel LCD Monitor
$399.99
Add to Cart
Add to Wishlist
Add to Compare

**Figure 182. Cross-Sell Item**

Cross-sell products are displayed after a product has already been added to the shopping cart. By default, three products are randomly selected by Magento CE from the products that have been defined as Cross-sell products of all the products in the shopping cart.

### To add Cross-sell products to a product:

1. In the Admin Panel, select **Catalog > Manage Products** to display a list of products.
2. Click the **Edit** link that appears on the right side of the row of the product for which you want to define Related Products.
3. Select the **Cross Sells** tab in the panel on the left to display the Product Listing page.

   **Tip:** By default the list shows only products already selected as cross-sells. If there are none, or you want to add other products, click the **Reset Filter** button to display a list of all the products.

4. Use the check box in each row of the products that you want to appear as Cross-sells for this product.
5. Click the **Save** button.

# Catalog and Shopping Cart Price Rules

There are two types of price rules in Magento CE: **Catalog Price Rules** and **Shopping Cart Price Rules**. Catalog Price Rules are applied to products before they are added to the shopping cart. Shopping Cart Price Rules are applied to products in the shopping cart.

## Catalog Price Rules

**Catalog Price Rules** are applied to products before they are added to a shopping cart. They can be used to create sales and discounts that do not require that a discount code be supplied by the customer. The process of defining a **Catalog Price Rule** consists of three stages:

- **Defining the Catalog Price Rule Information,** page 190, defines general information about the rule.
- **Defining the Catalog Price Rule Conditions,** page 192, defines the conditions that trigger the rule.
- **Defining the Catalog Price Rule Actions,** page 194, defines the actions that are executed when the conditions of this rule are met.

### Defining the Catalog Price Rule Information

To create a Catalog Price Rule:

1. From the Admin Panel, select **Promotions > Catalog Price Rules > Add New Rule** button to display the page shown in Figure 183.

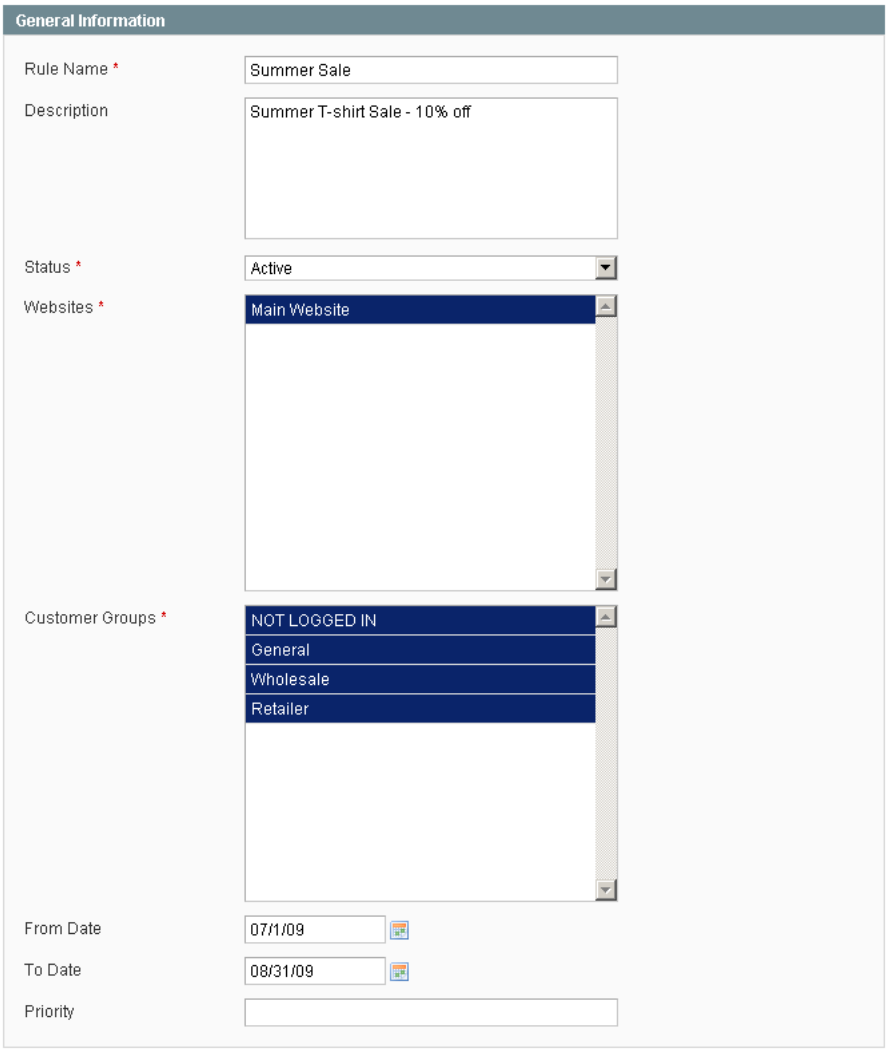



Figure 183. Adding a New Catalog Price Rule

2. In the **Rule Name** and the **Description** fields, specify a unique name and a description for this Catalog Price Rule.
3. In the **Status** field, select **Active**.
4. In the **Websites** field, select the website to which this rule applies.
5. In the **Customer Groups** field, select one or more customer groups to which this rule applies.
6. In the **From Date** and **To Date** fields, set a date range for the rule to take effect. If you leave the date range empty, then the rule is enabled as soon as it is created.

**Advanced Tip:** You can use the **Priority** field (**1** is the highest priority) when there are multiple rules. This determines which rule takes effect when more than one **Catalog Price Rule** applies.

## Defining the Catalog Price Rule Conditions

After you have set up the general information for the price rule, you must create the conditions that specify when the rule is triggered.

The following example shows how to discount every T-shirt that is over $20 by 10% by defining a rule that has two conditions.

### To define Catalog Price Rule Conditions:

1. Select the **Conditions** option in the panel on the left to display the page shown in Figure 184.

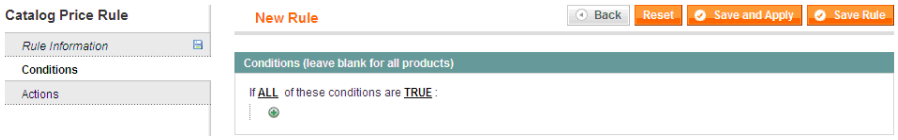



**Figure 184. Specifying Rule Conditions**

2. The first rule appears by default: **If ALL these Conditions are TRUE**. It specifies whether the rules that you define must **all** be met or if **any** of them can be met (AND or OR) in order to trigger the rule's action. In our example, we wanted the discount to take effect when the product is a T-shirt **and** when the T-shirt costs over $20. Therefore, leave the word **ALL** in the page above.

3. Click on the icon to display a selection field and select the **SKU** option under **Product Attributes** from the dropdown menu. The page changes as shown in Figure 185.

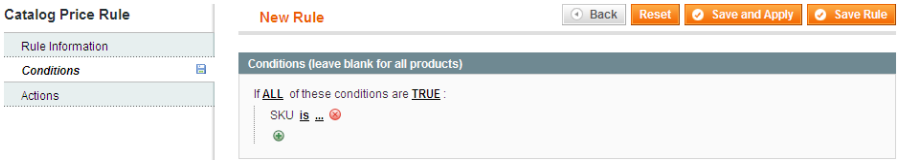



**Figure 185. Adding a SKU Condition**

4. Click on the **is** link to display the comparison operator drop-down list shown in Figure 186.

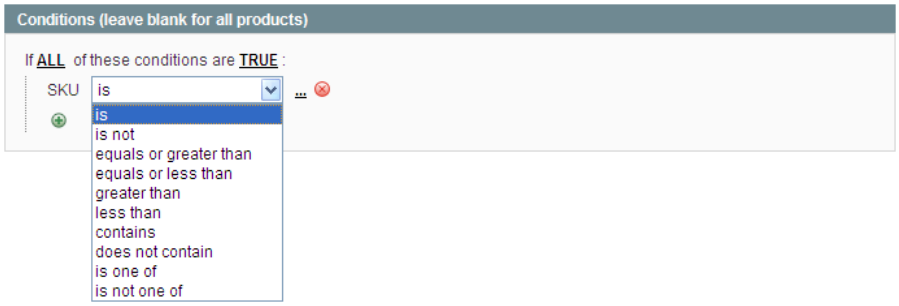



**Figure 186. Comparison Operator Drop-down list**

5. Select the **is one of** comparison operator.

6. Click on the three dots to the right of the words **is one of** to display the value field, as shown in Figure 187.

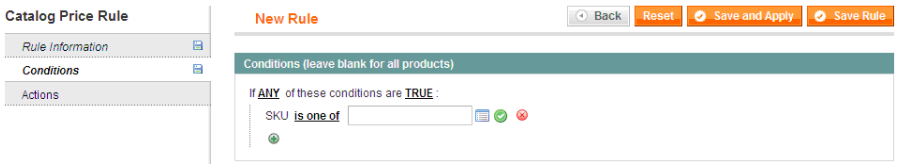



Figure 187. Value Field

7. Click on the **Chooser** icon to display a list of products from which you can select, as shown in Figure 188.

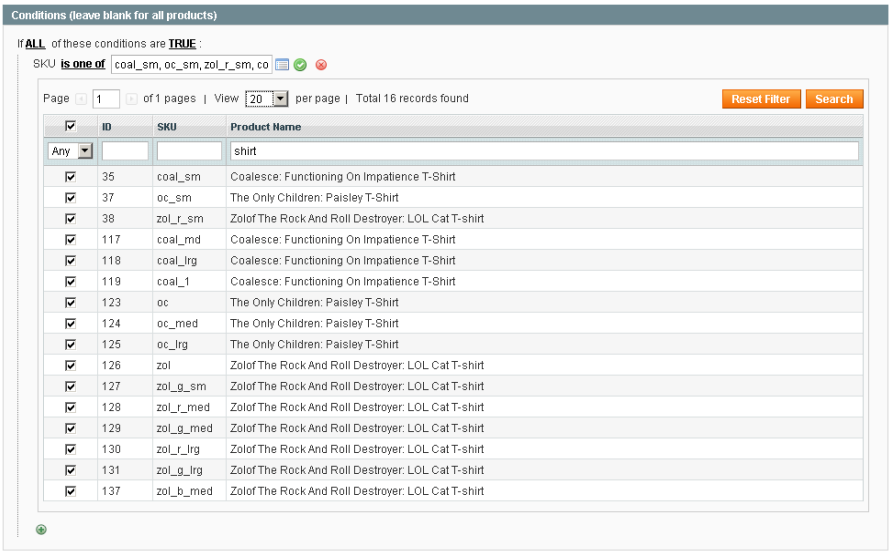

Conditions (leave blank for all products)
If ALL of these conditions are TRUE :
SKU is one of coal_sm, oc_sm, zol_r_sm, co
Page 1 of 1 pages | View 20 per page | Total 16 records found
Reset Filter
Search
ID
SKU
Product Name
Any
shirt
35 coal_sm Coalesce: Functioning On Impatience T-Shirt
37 oc_sm The Only Children: Paisley T-Shirt
38 zol_r_sm Zolof The Rock And Roll Destroyer: LOL Cat T-shirt
117 coal_md Coalesce: Functioning On Impatience T-Shirt
118 coal_lrg Coalesce: Functioning On Impatience T-Shirt
119 coal_1 Coalesce: Functioning On Impatience T-Shirt
123 oc The Only Children: Paisley T-Shirt
124 oc_med The Only Children: Paisley T-Shirt
125 oc_lrg The Only Children: Paisley T-Shirt
126 zol Zolof The Rock And Roll Destroyer: LOL Cat T-shirt
127 zol_g_sm Zolof The Rock And Roll Destroyer: LOL Cat T-shirt
128 zol_r_med Zolof The Rock And Roll Destroyer: LOL Cat T-shirt
129 zol_g_med Zolof The Rock And Roll Destroyer: LOL Cat T-shirt
130 zol_r_lrg Zolof The Rock And Roll Destroyer: LOL Cat T-shirt
131 zol_g_lrg Zolof The Rock And Roll Destroyer: LOL Cat T-shirt
137 zol_b_med Zolof The Rock And Roll Destroyer: LOL Cat T-shirt

Figure 188. Item Selection

The page above shows the list of products filtered to show only those that have the word **Shirt** in their name.

8. Select the check boxes of the products (T-shirts in this example) to which this rule is to apply.

9. Save this selection of products by clicking the **Apply** icon .

10. Now this rule specifies that it applies to T-shirts. You must now add the Condition that the product must cost over $20 in order for the rule to apply. To do so, click on the icon to display a selection field and select the **Price** option under **Product Attributes** from the drop-down list.

11. Click on the **is** link and select **equals or greater than** from the comparison operator drop-down list.

12. Enter the value 20.00 in the value field on the right to create the second Condition, as shown in Figure 189.

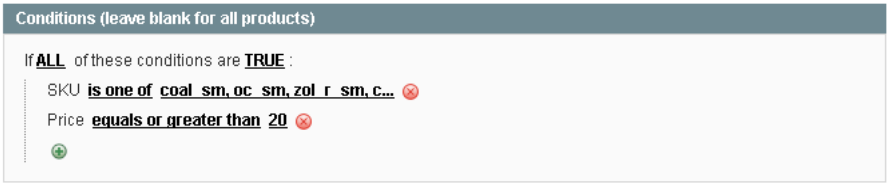

Conditions (leave blank for all products)
If ALL of these conditions are TRUE :
SKU is one of coal_sm, oc_sm, zol_r_sm, c...
Price equals or greater than 20

Figure 189. Two Conditions Specified

## Defining the Catalog Price Rule Actions

Now that the conditions have been defined that trigger this rule, we must define the actions to be taken when the conditions are met. The following defines that the price is discounted by 10%.

### To define Catalog Price Rule Actions:

1. Select the **Actions** option in the panel on the left to display the page shown in Figure 190.

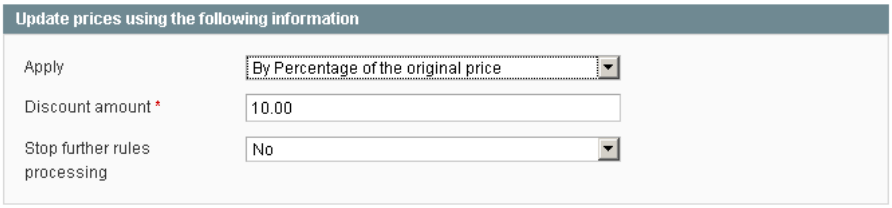



Figure 190. Specifying Actions

2. The **Apply** drop-down list enables you to define whether the discount that is specified in the **Discount amount** field is a percentage or a fixed amount of the price of this product. It also enables you to define whether the discount amount is subtracted from the original price (**By**) or whether the **Discount amount** field actually defines the final price (**To**). For our example, in the **Apply** field, select **By Percentage of the original price**.
3. In the **Discount** Amount field, specify the value **10.00**. This specification defines a final price that is a 10% reduction of the original price.

   **Note:** Mistakenly selecting the **To Percentage of the original price** option would give a final price that is equal to 10% of the original price, meaning a 90% reduction.

4. Select the **Save Rule** button to create the rule.
5. You must also select either the **Save and Apply** or the **Apply Rules** button to immediately apply this discount to the selected products.

   **Note:** As you add new rules, the system must recalculate the prices and the priorities of the rules. Generally, system rules are automatically processed and applied each night. In order to apply a new rule immediately, you must select one of the **Apply** buttons.

# Shopping Cart Price Rules

Shopping Cart Price Rules, as the name implies, are applied when a customer reaches the shopping cart. They can be applied either with or without the customer entering a coupon code, and include features not found in traditional coupon tools. This example defines a simple 10% discount coupon to be used for clogs when the shopping cart subtotal is over $100.

The process of defining a **Cart Price Rule** consists of three stages:

- **Defining the Cart Price Rule Information,** page 195, defines general information about this rule.
- **Defining the Cart Price Rule Conditions**, page 197, defines the conditions that trigger the rule.
- **Defining the Cart Price Rule Actions**, page 197, defines the actions that are executed when the conditions of this rule are met.

## Defining the Cart Price Rule Information

### To create a Cart Price Rule:

1. In the Admin Panel, select **Promotions > Cart Price Rules > Add New Rule** button to display the page shown in Figure 191.

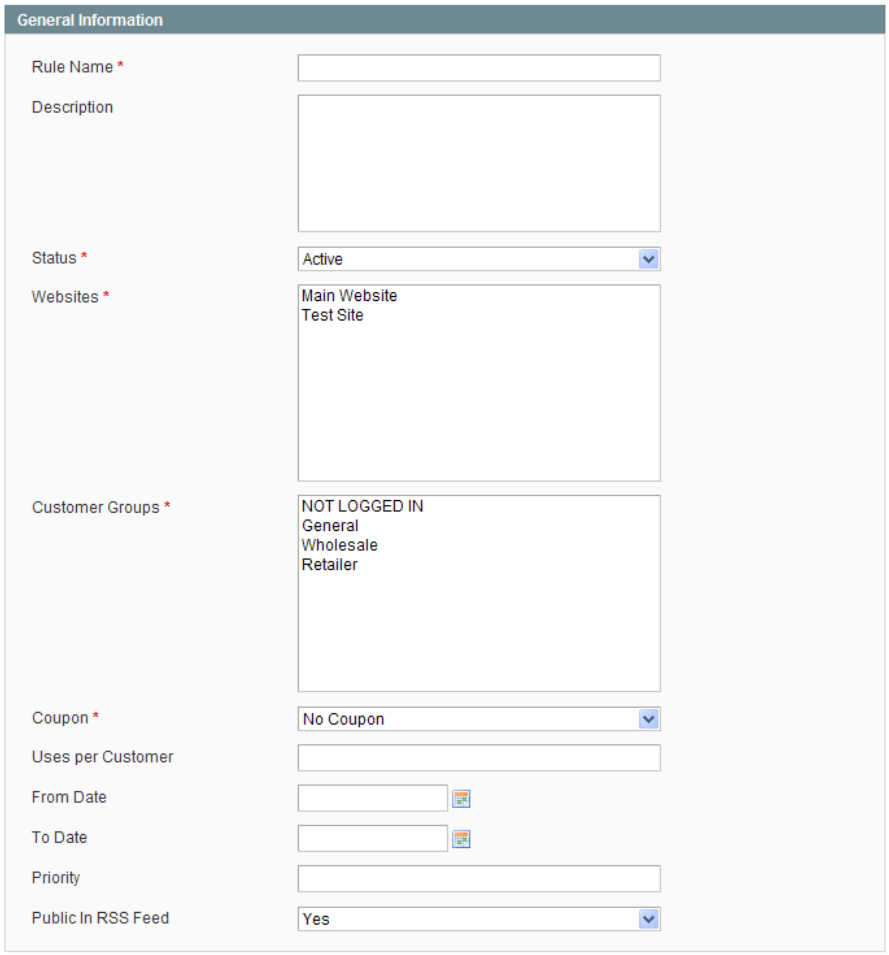



Figure 191. Adding a New Shopping Cart Price Rule

1. In the **Rule Name** field and the **Description** field, specify a unique name and a description for this Shopping Cart Price Rule.
2. In the **Status** field, select **Active**.
3. In the **Website** field, select the website to which this coupon applies.
4. To specify that this rule only applies when a coupon code is used, select **Specific** Coupon in the Coupon drop-down list, and specify the code of the coupon that the customer must specify in the web store.
5. To specify that each customer can use this coupon only once, specify **1** in the **Uses Per Customer** field.

   **Tip:** If you want to create a limited offer, the coupon can be limited to be used a certain number of times by selecting **Specific** Coupon in the Coupon drop-down list and specifying that number the **Uses per coupon** field.

6. In the **From Date** and **To Date** fields, set a date range for the rule to take effect. If you leave the date range empty, then the rule is enabled as soon as it is created.

**Advanced Tip:** You can use the **Priority** field (**1** is the highest priority) when there are multiple rules. It determines which rule takes effect first when more than one Cart Price Rule applies.

7. By default, an announcement of this shopping cart price rule is included in your store's RSS feed. To suppress this announcement, select **No** in the **Public in RSS Feed** drop-down list.

## Defining the Cart Price Rule Conditions

After you have set up the general information for the price rule, you create the Conditions that specify when the rule is triggered. The following example shows how to create a rule that has one condition, which checks when the shopping cart subtotal is over $100.

### To define Catalog Price Rule Conditions:

Select the **Conditions** option in the panel on the left and define a rule with the single condition "Subtotal equals or greater than 100," as shown in Figure 192.

Apply the rule only if the following conditions are met (leave blank for all products)
If ALL of these conditions are TRUE :
Subtotal equals or greater than 100

Figure 192. Shopping Cart Price Rule Condition

## Defining the Cart Price Rule Actions

Now that the condition has been defined that triggers this rule, you must define the actions to be taken. The following defines that 10% is reduced from the product's original price.

### To define Cart Price Rule Actions:

1. Select the **Actions** option in the panel on the left to display the page shown in Figure 193.

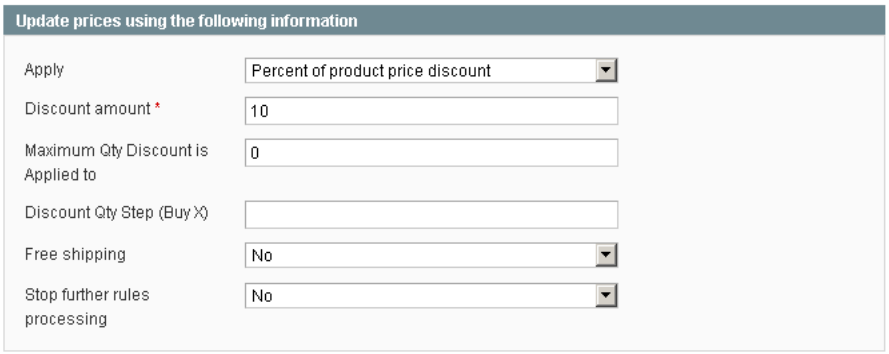



Figure 193. Specifying Shopping Cart Price Rule Actions

2. The **Action** tab has two important sections. The first one controls the discount. In the **Apply** field, select **Percent of product price discount**.

3. In the **Discount amount** field, specify **10** to indicate that 10% is reduced from the product's original price.

   **Tip:** Other options, not related to this example, are available, such as: **Fixed amount discount**, **Fixed amount discount for whole shopping cart,** and **Buy X get Y free**.

4. In the **Maximum Qty Discount is Applied to** field, specify the maximum quantity of products to which this discount can be applied. If you enter **5** in this field, then the first five products of this type purchased in the same shopping cart get the 10% discount and the sixth product of the same type does not get the discount.

5. In the **Discount Qty Step (Buy X)** field, specify how often the discount is applied. This field is not relevant to our example, so leave this field empty. If you enter 8 here, then a 10% discount is applied to all the products after the eighth product is added to the shopping cart. If more than eight items are added to the shopping cart, the ninth through 15th products do not get the discount until the 16th product is added to the shopping cart, at which point the discount is 10% for all 16 products. This discount continues for every factor of eight.

6. In the **Free Shipping** field, specify whether to combine the coupon amount with a free shipping offer, for only the products for which the coupon is valid or for the entire Order, when one of these products is in the shopping cart. This field is not relevant to our example, so leave the **No** value in this field.

7. After defining the coupon as described above, select the products for which the coupon is valid. In our example, the coupon discount applies to clogs. Define a condition that applies to the SKU of clogs, as shown in Figure 194.

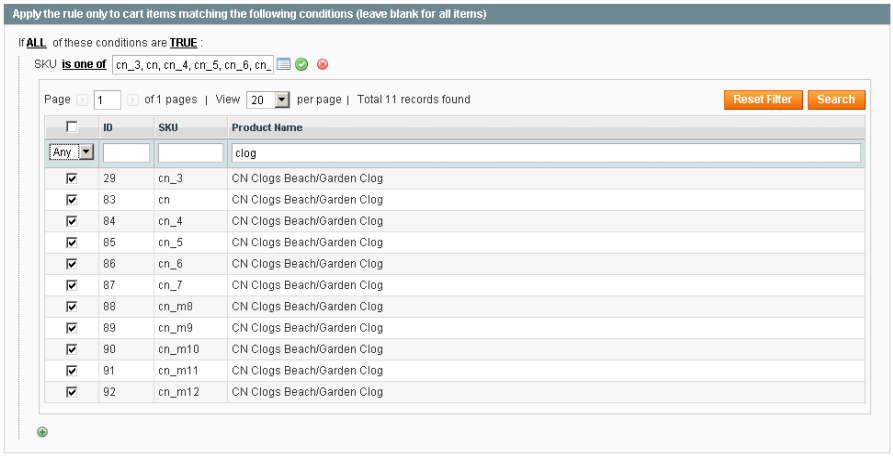

Apply the rule only to cart items matching the following conditions (leave blank for all items)
If ALL of these conditions are TRUE :
SKU is one of cn_3, cn, cn_4, cn_5, cn_6, cn_
Page 1 of 1 pages | View 20 per page | Total 11 records found
Reset Filter
Search
ID
SKU
Product Name
Any
clog
29 cn_3 CN Clogs Beach/Garden Clog
83 cn CN Clogs Beach/Garden Clog
84 cn_4 CN Clogs Beach/Garden Clog
85 cn_5 CN Clogs Beach/Garden Clog
86 cn_6 CN Clogs Beach/Garden Clog
87 cn_7 CN Clogs Beach/Garden Clog
88 cn_m8 CN Clogs Beach/Garden Clog
89 cn_m9 CN Clogs Beach/Garden Clog
90 cn_m10 CN Clogs Beach/Garden Clog
91 cn_m11 CN Clogs Beach/Garden Clog
92 cn_m12 CN Clogs Beach/Garden Clog

**Figure 194. Specifying Products to Apply the Discount To**

8. Click the **Save Rule** button.

## Example: Defining a Buy 2 Get 1 Free Promotion

This section describes how to create another discount coupon with a **Buy 2 get 1 free** promotion. In this example, the web store is trying to push a digital camera as a family deal. This is a Shopping Cart Price rule.

### To define a Buy 2 get 1 free promotion:

1. Define the **Coupon Information**, as described in "Shopping Cart Price Rules," page 195, but leave the **Coupon** drop-down list selected to **No Coupon**. This selection specifies that the discount takes effect as soon as a customer adds the products to the shopping cart.

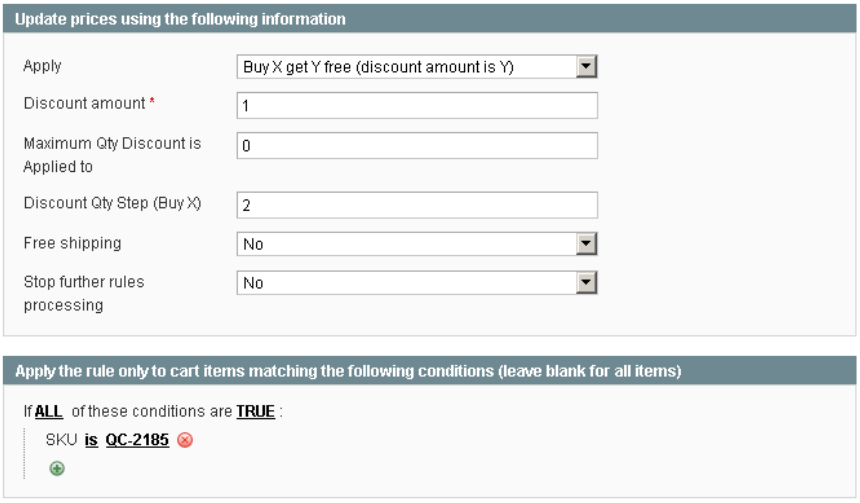

Update prices using the following information
Apply
Buy X get Y free (discount amount is Y)
Discount amount *
1
Maximum Qty Discount is Applied to
0
Discount Qty Step (Buy X)
2
Free shipping
No
Stop further rules processing
No
Apply the rule only to cart items matching the following conditions (leave blank for all items)
If ALL of these conditions are TRUE :
SKU is QC-2185

Figure 195. Buy X get Y Free Promotion

2. Do not define any conditions, because this rule is always applied to the Digital Camera. The deal is created for the Argus QC-2185 Quick Click 5MP Digital Camera available in the Magento Sample Data.
3. Click the **Actions** tab in the left navigation bar. In the **Apply** field, select the **Buy X get Y free** option.
4. In the **Discount Amount** field, specify **1**. This is the number of units that are offered free.
5. In the **Discount Qty Step** field, specify **2**. This is the number of units that must be purchased in order to receive the free unit.
6. In the bottom section, set up the condition to specify the SKU of the item that is featured in this promotion
7. Click the **Save Rule** button.

   You can now send out your marketing message telling customers that if they buy 3 Argus QC-2185 Quick Click 5MP Digital Cameras one of them will be free.

**Tip:** It is good practice to test the effect of these rules yourself before trying them out on the public. Either use a discount code that only you know or assign your test customer to a testing customer group and limit the cart rules to only that customer group.

# Auto-Generating Coupon Codes

For shopping cart price rules, you can auto-generate batches of coupon codes and track their usage.

## Auto-Generating Coupon Codes Quick Reference

Batches of discount coupon codes can be generated and managed on the **Manage Coupon Codes** tab of the Shopping Cart Price Rule page (**Promotions** > **Shopping Cart Price Rules** > %your rule%). To make the tab appear, in the **Coupon** field select **Specific Coupon**, select the **Use Auto Generation** check box, and click **Save and Continue Edit**. See Figure 196.

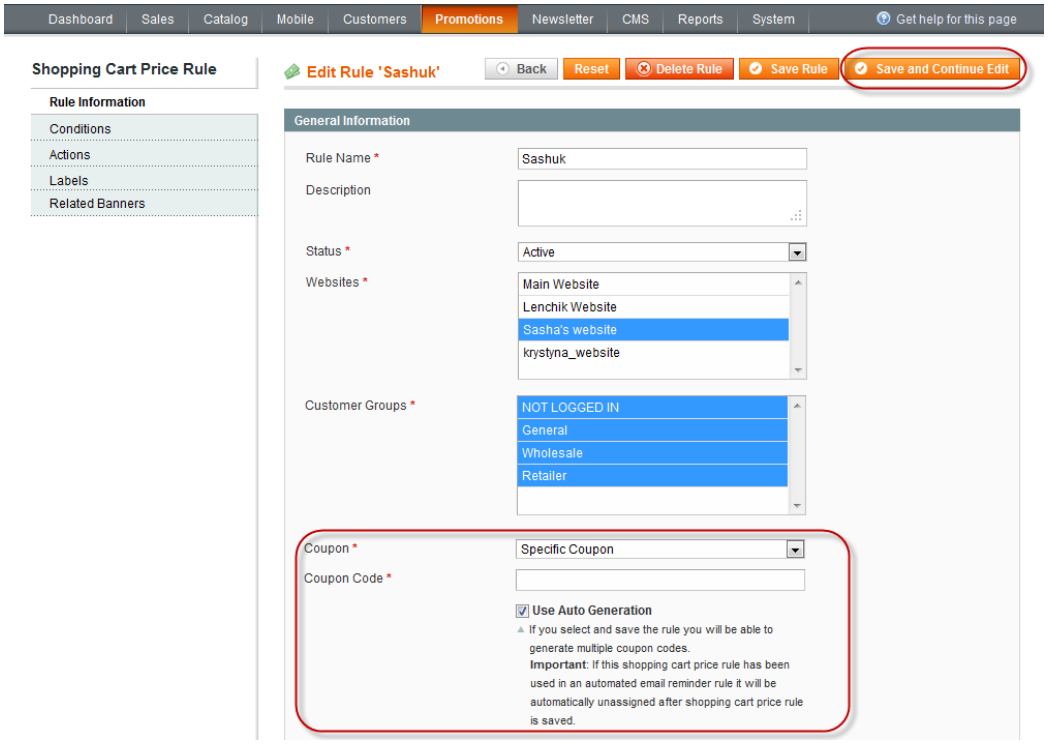



**Figure 196. The Shopping Cart Price Rule page. Enabling the auto-generation of coupon codes.**

The default settings for the format of auto-generated coupon codes are configured under **System > Configuration > Promotions > Auto Generated Specific Coupon Codes.**

For detailed description of the auto-generation of coupon codes, see Auto-Generating, Exporting, and Managing Coupon Codes, page 201.

## Configuring Coupon Codes Auto-Generation Settings

You can set the default requirements for the coupon code format under **System > Configuration > Promotions > Auto Generated Specific Coupon Codes.** The following settings are available for configuring:

- **Code Length:** Defines a coupon code length excluding prefix, suffix and separators.
- **Code Format:** Defines a coupon code format. The options are: **Alphanumeric** (a combination of letters and numbers), **Alphabetical** (letters only), **Numeric** (numbers only).
- **Code Prefix:** Defines a value that will be appended to the beginning of all the coupon codes. If you do not want to use a prefix, leave this field blank.
- **Code Suffix:** Defines a value that will be appended to the end of all codes. If you do not want to use a suffix, leave this field blank.
- **Dash Every X Characters:** Defines the interval at which a dash (-) will be inserted in all coupon codes. If you do not want to use a dash, leave this field blank.

**Note:** Coupons whose codes differ only by dash character(s) are considered to be different coupons.

These settings can be overridden each time you need to generate a batch of coupons on the Shopping Cart Price Rule page.

## Auto-Generating, Exporting, and Managing Coupon Codes

### To generate and export a batch of coupon codes:

1. Log in to the Magento Admin Panel.
2. Navigate to **Promotions** > **Shopping Cart Price Rules**.
3. Select an existing rule or create a new one.
4. In the **Coupon** field select **Specific Coupon**.
5. Select the **Use Auto Generation** check box. Perform other rule configurations, if necessary.

**Important Note:** Shopping cart price rules with auto-generated coupon codes cannot be used in automated email reminders. If the shopping cart price rule for which you set **Specific Coupon** in the **Coupon** field has been used in an automated email reminder rule, it will be automatically unassigned after saving the rule.

6. Click **Save and Continue Editing**. The **Manage Coupon Codes** tab appears. See Figure 197.

7. On the **Manage Coupon Codes** tab, specify the quantity of codes to be generated in the **Coupon Qty** field, correct the code format settings (if necessary) and click **Generate**. The generated coupon codes appear in the grid. For each coupon, you can see whether it has been used and how many times. To delete the coupon codes, select the check boxes in the first column, select **Delete** from the **Actions** drop-down menu, and click **Submit**.

8. To export the codes, filter the list of codes so that only the desired codes are displayed, choose the file extension in the **Export to** field, click **Export**, and save the file.

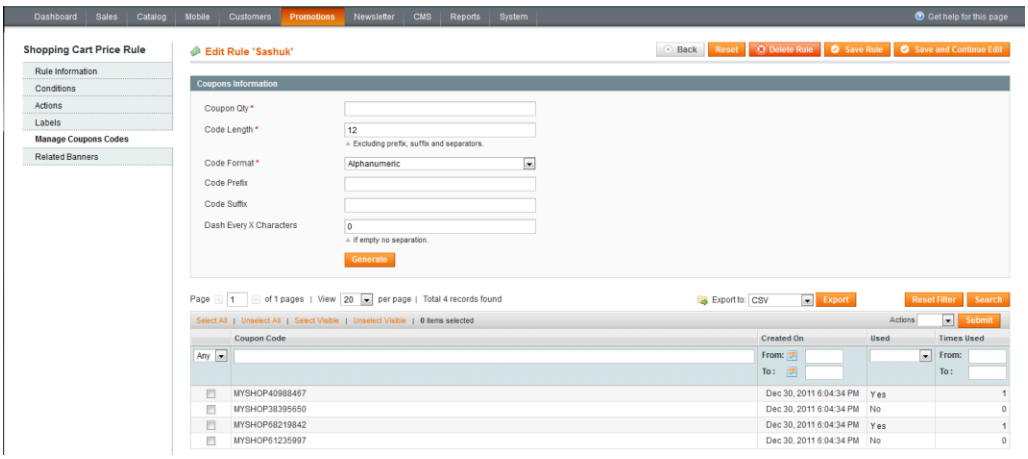



**Figure 197. The Shopping Cart Price Rule page. Generating and managing coupon codes.**

## Tracking the Usage of Coupon Codes

Information about how often each coupon was used is displayed in the grid on the **Manage Coupon Codes** tab of the Shopping Cart Price Rule page. See Figure 197 above for illustration of the grid. You can also create detailed report about coupon usage in orders.

### To create a report about the usage of coupons generated for a specific shopping cart price rule:

1. Navigate to **Reports** > **Sales** > **Coupons**. The **Coupons Usage Report** page opens.
2. In the **Show Report For** field select the scope, configure report filters. In the **Shopping Cart Price Rule** field select **Specified** and select the desired rule(s).
3. Click **Show Report** in the upper right corner of the page.

# Special Prices

Special prices enable you to define a discounted price for a product for a specified period of time.

## To define Special Price:

1. In the Admin Panel, select **Catalog > Manage Products** to display the list of products.
2. Click the **Edit** link on the right side of the relevant product's row.
3. Click the **Prices** tab in the left navigation panel.

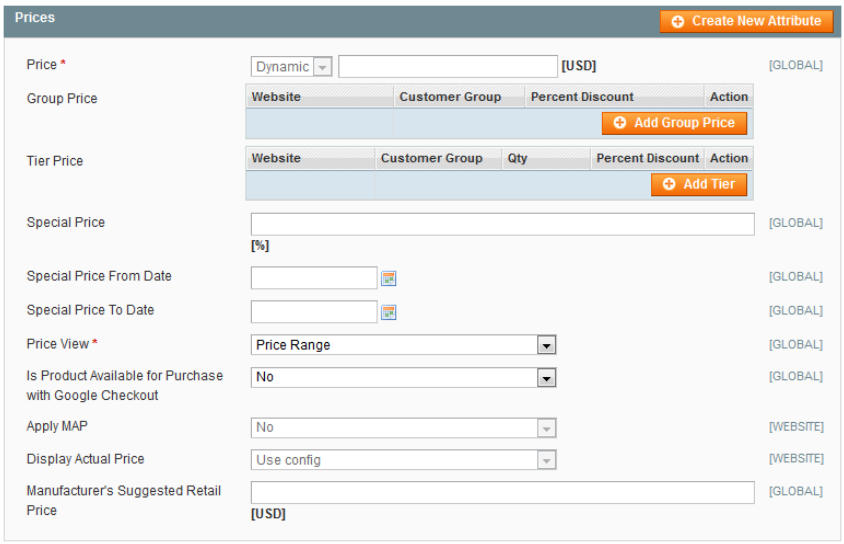



**Figure 198. Prices Options**

4. In the **Special Price** field, enter the special price.
5. Optionally, set **Special Price From** / **To Date**. If you leave these fields blank, the special price is applied immediately and applies until removed on the same page.
6. Click **Save**.

The special price is shown on the frontend as shown in Figure 199.

**Figure 199. Special Price – Frontend**

# Tier Pricing

Tier Pricing is a promotional tool that enables a web store owner to price products differently when higher quantities are purchased. This is an effective way to move more merchandise and appeal to customers who buy more than one product at a time. When a customer adds a certain quantity of a product to their shopping cart, the price is automatically changed to reflect the discount.

## To define Tier Pricing:

1. In the Admin Panel, select **Catalog > Manage Products** to display the list of products.
2. Click the **Edit** link on the right side of the relevant product's row.
3. Click the **Prices** tab in the left navigation panel.
4. Add tiers by clicking the **Add Tier** button. You can create as many tiers as you need.

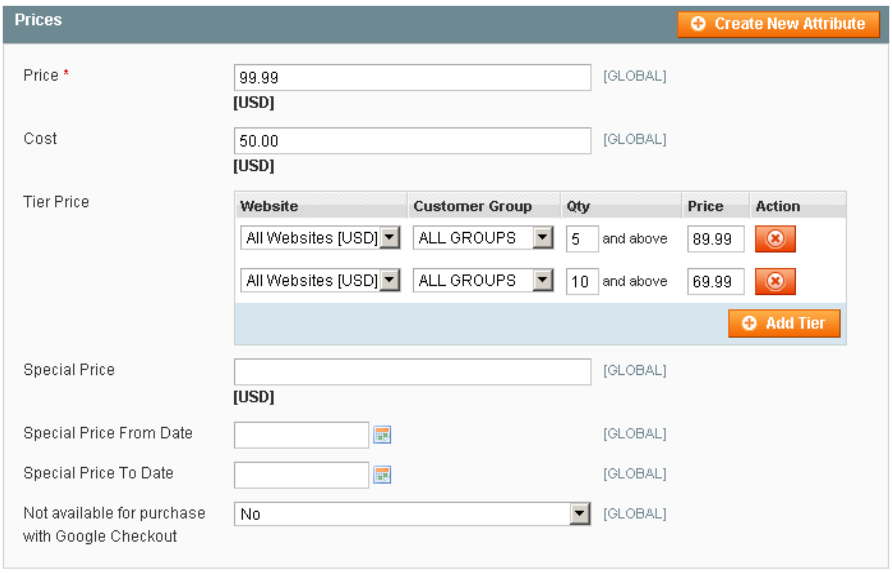



**Figure 200. Specifying Price Tiers**

5. Click **Save**.

**Tip:** To apply a tier to multiple groups, but not all groups, create multiple tiers, each with the same Qty and Price information and select a different customer group in each.

The prices on the frontend take precedence from the highest to the lowest quantity. Therefore, if you have a tier for the quantity 5 and one for the quantity 10 and a customer adds 5, 6, 7, 8 or 9 items to the shopping cart, then the customer gets the discounted price that you specified for the quantity 5 tier. As soon as the customer adds the 10th item, the discounted price specified for the quantity 10 tier supersedes the quantity 5 tier and that discounted price (of 10) applies instead.

After saving the product, it shows the Tier Pricing block on the frontend.

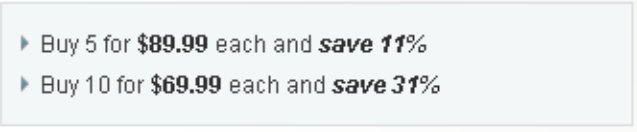



Figure 201. Tier Pricing Block- Frontend

On the product listing pages, the best available deal is displayed below the regular price, as shown in Figure 202.

Figure 202. "As Low As" Indication

# Minimum Advertised Price

This section describes how a Minimum Advertised Price (MAP) policy can be applied in Magento CE.

## Minimum Advertised Price – General Concept

If you have a minimum advertised price in the agreement with a manufacturer, you can still sell the merchandise at lower price, though this price will be hidden. It will not be visible to customers on the product page and will not be indexed by search engines. As a result, a price below the minimum advertised will not appear in any catalog of products collected from multiple web stores. The "crossed-out" price, which can be displayed on catalog and product pages, will be the manufacturer's suggested retail price (MSRP). For storing the MSRP value, a new system attribute was added to the default attribute set.

An individual setting enables you to specify how the actual price is shown to customers: on clicking the **Check for price** link on a catalog or product page, when a product is added to the shopping cart, or before the order confirmation.

The MAP functionality can be applied to all product types except gift card products, and bundle products with dynamic pricing.

The MAP functionality only influences the way products prices are displayed on the frontend.

The following terminology is used in reference to this feature:

- **Actual Price:** The price that is specified in the Price of Special Price field on the product view page.
- **Manufacturer's Suggested Retail Price (MSRP):** The retail price as suggested by the manufacturer. The Actual Price is typically lower than MSRP.

## Minimum Advertised Price – a Quick View

MAP can be enabled and configured under **System > Configuration > Sales > Minimum Advertised Price**. See Figure 203.

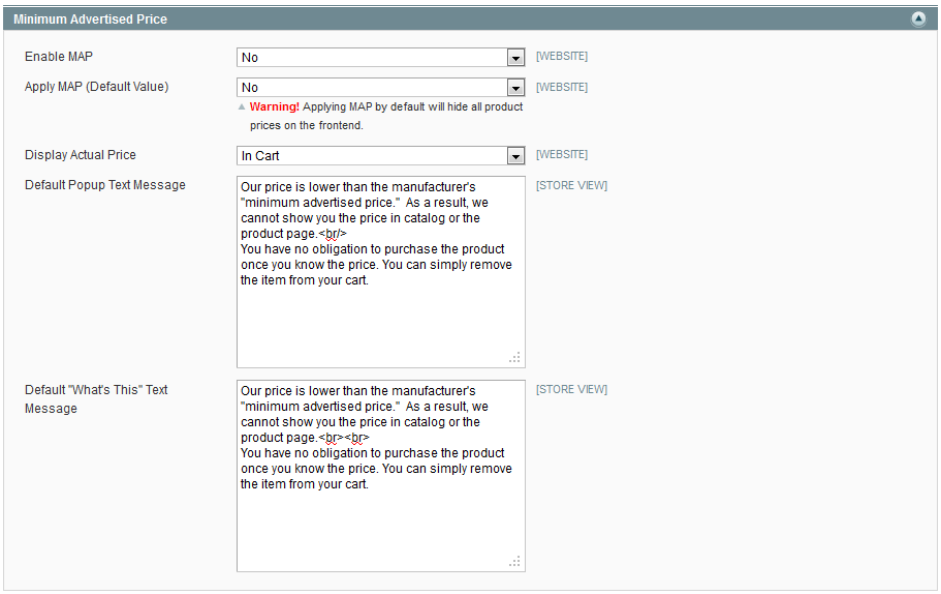

Minimum Advertised Price
Enable MAP
No
[WEBSITE]
Apply MAP (Default Value)
No
[WEBSITE]
Warning! Applying MAP by default will hide all product prices on the frontend.
Display Actual Price
In Cart
[WEBSITE]
Default Popup Text Message
Our price is lower than the manufacturer's "minimum advertised price." As a result, we cannot show you the price in catalog or the product page.<br/>
You have no obligation to purchase the product once you know the price. You can simply remove the item from your cart.
[STORE VIEW]
Default "What's This" Text Message
Our price is lower than the manufacturer's "minimum advertised price." As a result, we cannot show you the price in catalog or the product page.<br><br>
You have no obligation to purchase the product once you know the price. You can simply remove the item from your cart.
[STORE VIEW]

**Figure 203. MAP global settings**

After MAP is enabled, the configuration on the product level becomes available with the **Apply MAP**, **Display Actual Price**, and **Manufacturer's Suggested Retail Price** fields. See Figure 204.

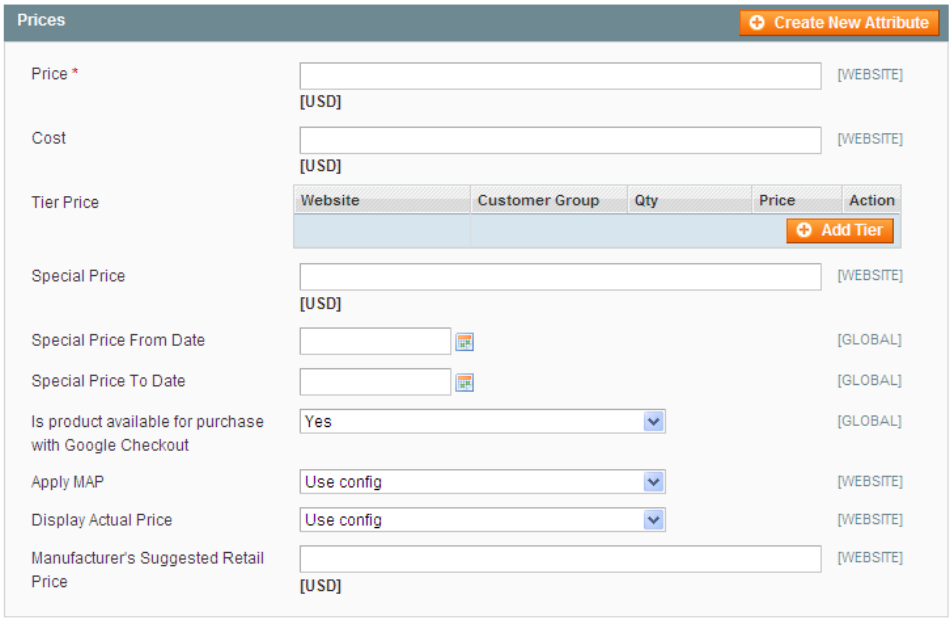



Figure 204. MAP settings on product level

When MAP is applied globally, all prices on the frontend are hidden; the **Click for price** links appear instead. If you specify the Manufacturer's Suggested Retail Price (MSRP), it will appear crossed-out. See Figure 205.

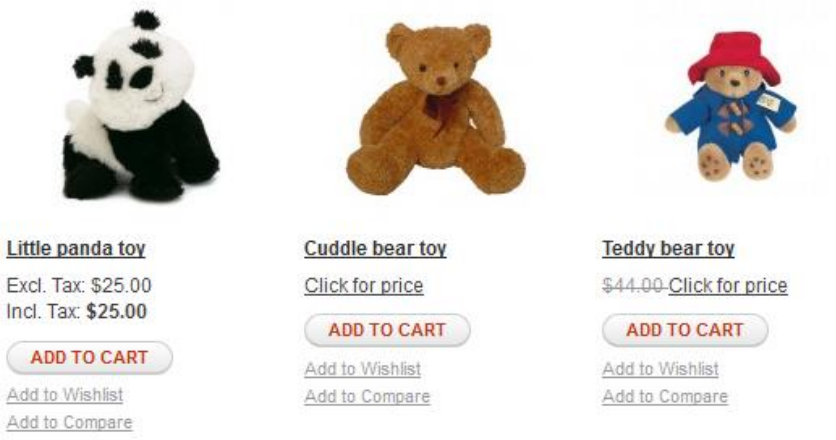



Figure 205. MAP is applied for the "Cuddle bear toy" and "Teddy bear toy" products. For the "Teddy bear toy," the MSRP is specified, and it appears crossed out.

The way the actual price is displayed depends on the **Display Actual Price** setting. The following options are available:

- **On Gesture** (default value) - Clicking the **Click for price** link opens a pop-up window, containing the actual price and the information message. The actual price is shown on the last steps of the ordering process as well. See Figure 206.

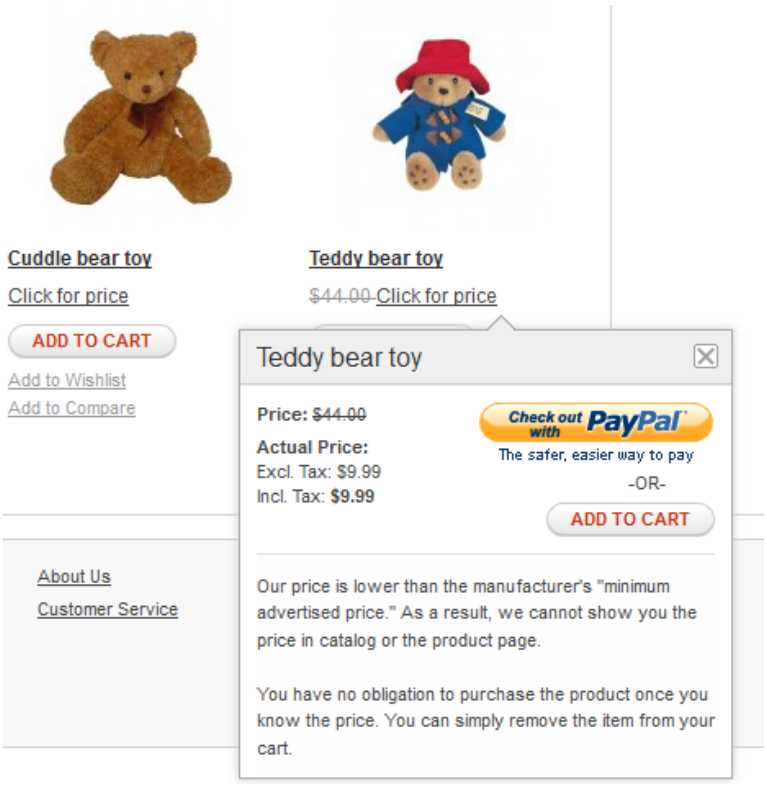

Cuddle bear toy
Click for price
ADD TO CART
Add to Wishlist
Add to Compare
Teddy bear toy
$44.00 Click for price
Teddy bear toy
Price: $44.00
Actual Price:
Excl. Tax: $9.99
Incl. Tax: $9.99
Check out with PayPal
The safer, easier way to pay
-OR-
ADD TO CART
Our price is lower than the manufacturer's "minimum advertised price." As a result, we cannot show you the price in catalog or the product page.
You have no obligation to purchase the product once you know the price. You can simply remove the item from your cart.
About Us
Customer Service

Figure 206. For the "Teddy bear toy" the Display Actual Price is set to "On Gesture."

- **In Cart -** Clicking the **Click for price** link in a catalog redirects to the product page, where instead of the price or next to the crossed-out MSRP the following message is displayed: "To see product price, add this item to your cart. You can always remove it later." The **What's this** link is also included, which points to further explanations. The actual price of the product is displayed after it is added to the shopping cart. See Figure 207.

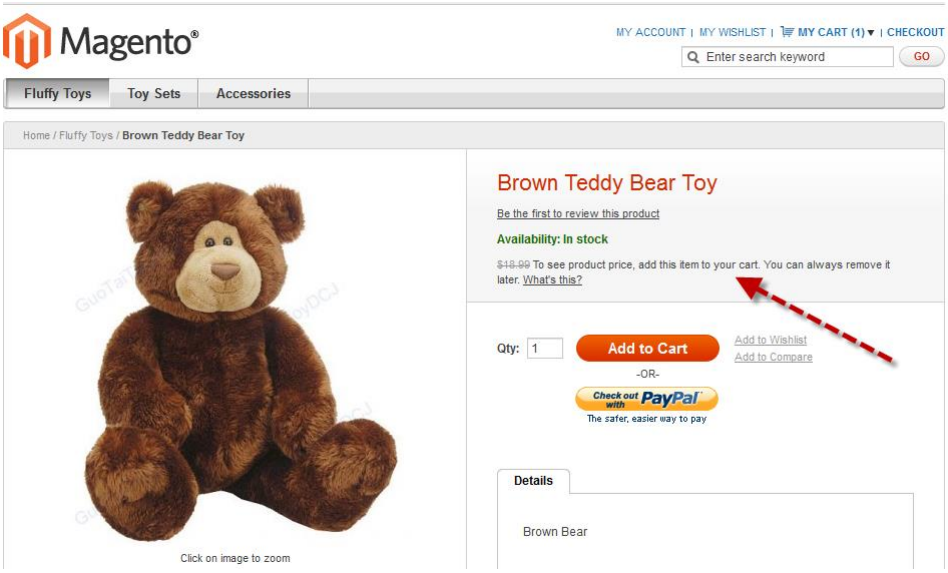

Magento®
MY ACCOUNT | MY WISHLIST | MY CART (1) | CHECKOUT
Enter search keyword
GO
Fluffy Toys
Toy Sets
Accessories
Home / Fluffy Toys / Brown Teddy Bear Toy
Brown Teddy Bear Toy
Be the first to review this product
Availability: In stock
$18.99 To see product price, add this item to your cart. You can always remove it later. What's this?
Qty: 1
Add to Cart
Add to Wishlist
Add to Compare
-OR-
Check out with PayPal
The safer, easier way to pay
Details
Brown Bear
Click on image to zoom

Figure 207. Product page on the fronted. Display Actual Price of the product is set to "In Cart."

- **Before Order Confirmation** - Clicking the **Click for price** link in a catalog redirects to the product page, where the following message is displayed instead of the price or next to the crossed-out MSRP: "See price before order confirmation." The **What's this** link points to further explanations. The actual price and totals are displayed on the Order Review step of the one-page checkout, or on the order review pages of the Google checkout or PayPal checkout. See Figure 208.

Figure 208. Product page on the fronted. Display Actual Price of the product is set to "In Cart."

For products that allow configuration on the frontend, and whose prices depend on the variant selected (the variants themselves can actually be either custom options or simple products with their own SKUs and stock management), the following logic is implemented if MAP is applied:

- MAP is applied to the main price; prices of the options, bundle items, and associated products (which add or subtract from the main price) are displayed normally.
- If a product does not have a main price, and its price is derived from the associated products' prices (such as in a grouped product), the MAP settings of the associated products are applied. Note that the MAP feature is not supported for bundled products with dynamic pricing.

Regarding other price settings, the MAP application logic is the following:

- If tier pricing is set, the tier price is displayed according to the **Display Actual Price** setting.
- If a special price is set, it is considered to be the actual price for MAP.

In the order management and customer management tools, as well as in the reports sections of the Admin Panel, only the actual price appears.

## Setting Up MAP

MAP functionality can be configured at both the global and product levels.

On the global level, you can enable/disable the functionality, apply it to all products, define how the actual price is displayed, and edit the text of the MAP related messages and information tips on the frontend.

When MAP is enabled globally, product-level MAP settings become available. For a product you can choose to apply MAP, specify the MSRP, and define how the actual price is displayed.

Product-level MAP settings override the global ones.

## Setting up MAP on the global level

By default the MAP functionality is disabled globally.

### To enable and configure MAP:

1. In the Magento Admin Panel, select **System**, and click **Configuration**.
2. In the **Current Configuration Scope** in the upper left corner of the page, select the desired website.
3. In the left column under SALES, click **Sales**.
4. On the **Minimum Advertised Price** field set configure the following settings:

| Option | Description | Scope |
|---|---|---|
| Enable MAP | Select **Yes** to enable the MAP. | Website |
| Apply MAP (Default Value) | Applies MAP to all catalog products.<br>If set to **Yes**, all prices in the catalog on the frontend are substituted with the **Click for price** links. On product pages, the prices are either substituted with the **Click for price** links or with the information about how to see prices, depending on the **Display Actual Price** setting. | Website |
| Display Actual Price | Defines how the actual price is displayed on the frontend. Select from the following:<br>• **On Gesture** - Clicking the **Click for price** link opens a pop-up window, containing the actual price. On all other stages of the ordering process (in the shopping cart, on the order review) the actual price is displayed normally.<br>• **In Cart** - Clicking the **Click for price** link in a catalog redirects to the product page. On the product page, the price is replaced with the following message: "To see price, add this item to your cart. You can always remove it later". The **What's this** link points to an information tip. The text of the information tip can be edited in the **Default "What's This" Text Message** field.<br>The actual price is shown when customer adds the product to the shopping cart. It is also shown during the checkout as usual.<br>• **Before Order Confirmation** - Clicking the **Click for price** link in a catalog redirects to the product page. On the product page the price is replaced with the following message: "See price before order confirmation." The **What's this** link points to the information tip.<br>The actual price is displayed on the Order Review step of the one page checkout or on the order review pages of the Google checkout or PayPal checkout. In the shopping cart, neither the prices nor the subtotals are displayed.<br>When there is at least one item in the shopping cart with **Display Actual Price** set to **Before Order Confirmation**, the order total is not shown in the cart. Instead, the message "Order total will be displayed before you submit the order" is shown. | Website |

| Option | Description | Scope |
|---|---|---|
| | The option selected defines how product prices are displayed in wishlists and comparison lists as well | |
| Default Pop-up Text Message | The text field for editing the information message displayed if the Display Actual Price field is set to On Gesture. | Store view |
| Default "What's This" Text Message | The text field for editing the text of the What's this information tip. | Store view |

5. To save the configuration, click the Save Config button in the upper-right corner of the page.

## Setting Up MAP on the Product Level

MAP settings on the product level become available once the MAP functionality is enabled.

For gift cards and bundle products with dynamic pricing, the MAP settings are not available.

### To configure MAP settings on a product level:

1. Select Catalog and click Manage Products.
2. Open the product for editing.
3. On the Prices tab, the following MAP settings are available:

| Option | Description |
|---|---|
| Apply MAP | Defines whether MAP is applied to the product. |
| Display Actual Price | Defines how the actual price of the product is displayed on the frontend. The value here overrides the corresponding global setting. |
| Manufacturer's Suggested Retail Price | The price at which a manufacturer "suggests" to sell the product. If specified, it appears crossed-out on the catalog and product pages on the frontend. |

4. To save the settings click Save or Save and Continue.

Note: If a product added to the shopping cart has MSRP specified, it will not be displayed crossed-out in the mini shopping cart or in the shopping cart side block.

## How MAP Is Applied for Different Product Types

The following describes how MAP is applied for different product types.

| Product type | MAP implementation |
|---|---|
| Simple, Virtual | The actual price is not shown on the catalog and product pages; it is displayed according to the Display Actual Price setting. The custom |

| Product type | MAP implementation |
|---|---|
| | options prices are displayed normally. |
| Grouped | Prices of the associated simple products are not shown on the catalog and product pages; they are displayed according to their **Display Actual Price** setting. |
| Configurable | The actual price is not shown on the catalog and product pages; it is displayed according to the **Display Actual Price** setting. The prices of the options are displayed normally. |
| Bundle with fixed price | The actual price is not shown in the catalog; it is displayed according to the **Display Actual Price** setting. The prices of the bundle items are displayed normally. |
| Downloadable | The actual price is not shown on the catalog and product pages; it is displayed according to the **Display Actual Price** setting. The prices of the links are displayed normally. |

## How MAP Is Applied for Different Price Settings

The following describes how MAP is applied for different price settings.

| Price setting | MAP implementation |
|---|---|
| Tier Price | If tier pricing is set, the tier pricing message is not displayed in the catalog. On the product page a notification is displayed that indicates that the price can be lower when ordering more than a certain quantity, but the discount is displayed in percentages only. For associated products of a grouped product, the discounts are not displayed on the product page.<br>The tier price is shown according to the **Display Actual Price** setting. |
| Special Price | If the Special price is specified, the special price is displayed according to the **Display Actual Price** setting. |

# Product Group Price

The Product Group Price feature enables you to set different product prices for different customer groups on the product level. The functionality is aimed at improving the admin user experience with setting promotional prices for customer groups.

## Terminology

- **Regular price**: The value of the *price* system product attribute (which by default corresponds to the **Price** field on the **Prices** tab of the Product Information page available under **Catalog** > **Manage Products** > *%desired product%*).

- **Promotional price:** A product price that is defined by any of the following system product attributes: *special_price*, *group_price,* or *tier_price*; or the resulting price after a catalog price rule is applied.

  **Note**: The group_price attribute is a system product attribute which was added for storing the group price value.

## Setting a Group Price for a Product

### To set a group price for a catalog product:

1. Log in to the Magento Admin Panel.
2. Navigate to **Catalog** > **Manage Products** > %desired product%. The Product Information page opens.
3. On the **Prices** tab in the **Group Price** field click **Add Group Price**.
4. Select the target customer group and specify the price for the selected group. The **Website** column defines the scope of the **Group Price** field.

   **Note**: For bundle products, the group price is specified as a discount percentage.If bundle items have their own group prices set for the same customer group, then the discount specified for the whole bundle product is applied to these group prices.

5. To save your changes, click **Save** or **Save and Continue Edit**.

## Group Price Implementation Details

A group price can be specified for the following product types:

- Simple
- Configurable
- Virtual
- Bundle
- Downloadable

The list of product types for which a group price can be specified is defined in the settings of the *group_price* product attribute. The settings are available under **Catalog** > **Attributes** > **Manage Attributes** > *group_price*. The list of product types, for which the attribute is used, can be configured in the **Apply To** field.

**Note**: For the Grouped and Gift Card product types, the Group Price functionality will not be applied even if these product types are selected in the **Apply To** field of the *group_price* attribute.In this case, for Grouped products, the Group Price field will not even be displayed on the Product Information page in the Admin Panel. For Gift Card products, the Group Price field will be displayed, but its value will not be considered by the system.

Displaying the group price in the frontend fits the general logic of price displaying in Magento. If besides the regular price, a product has promotional price(s), the lowest price value is displayed in the frontend. If a product custom option has price set as a percentage, than the lowest promotional price will be used as base for the calculation. The same logic is applied when the associated products (the options) of a configurable product have prices set as a percentage.

The following table illustrates how the minimum promotional price logic is implemented. The table provides several examples, but it is not an exhaustive list of possible combinations.

| **Backend Price Settings** | **Price Displayed in the Frontend** |
|---|---|
| Price = $4<br>Special Price = $5<br>Tier Price = $3 | For customers from the tier price group(s):<br>$ 4<br>As low as: $3<br>For customers from other groups:<br>$4 |
| Price = $5<br>Special Price = $3<br>Tier Price = $4 | For all customers:<br>~~Regular Price: $5~~<br>Special Price: $3 |
| Price = $5<br>Special Price = $3<br>Tier Price = $4<br>Price after a catalog price rule applied = $2 | For customers from the catalog price rule group:<br>~~Regular Price: $5~~<br>Special Price: $2<br>For customers from other groups:<br>~~Regular Price: $5~~<br>Special Price: $3 |
| Price = $5<br>Special Price = $4<br>Group Price = $3 | For customers from the price group:<br>~~Regular Price: $5~~<br>Special Price: $3<br>For customers from other groups:<br>~~Regular Price: $5~~<br>Special Price: $4 |

**Important Note**: When a group price is set for a product, then the catalog price rules for the corresponding customer groups are applied to the group price, not to the regular price.

# Newsletters

Magento CE provides a Newsletter feature, which enables store administrators to send newsletters to customers who have registered to receive them.

The first step in creating newsletters is to configure the newsletter settings for your site.

### To configure newsletter settings on your site:

1. In the Admin Panel, select **System > Configuration** to display the configuration page.
2. In the **CUSTOMERS** area in the left navigation panel, select the **Newsletter** option and expand the **Subscription Options** area to display the page shown in Figure 209.

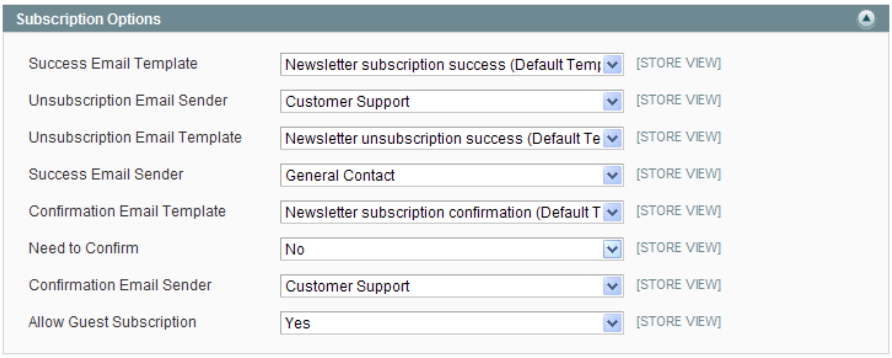



**Figure 209. Newsletter Subscription Options**

3. In the **Need to Confirm** field, select **Yes** to specify that each customer that registers for a newsletter will receive an email asking them to confirm their registration. This technique is called double opt-in, meaning that customers confirm that they want to receive a newsletter twice. This method reduces the number of customers that consider your newsletter as spam.

## Newsletter Templates

Before sending a newsletter, create a newsletter template. You can create and save as many of these as required for any situation, whether it be an annual holiday newsletter or weekly product updates.

### To create a new newsletter template:

1. In the Admin Panel, select **Newsletter > Newsletter Templates** to display a page listing the previously defined newsletter templates. You can edit an existing template or create a new one.
2. To add a new template, click the **Add New Template** button to display the New Newsletter Template page, as shown in Figure 209.

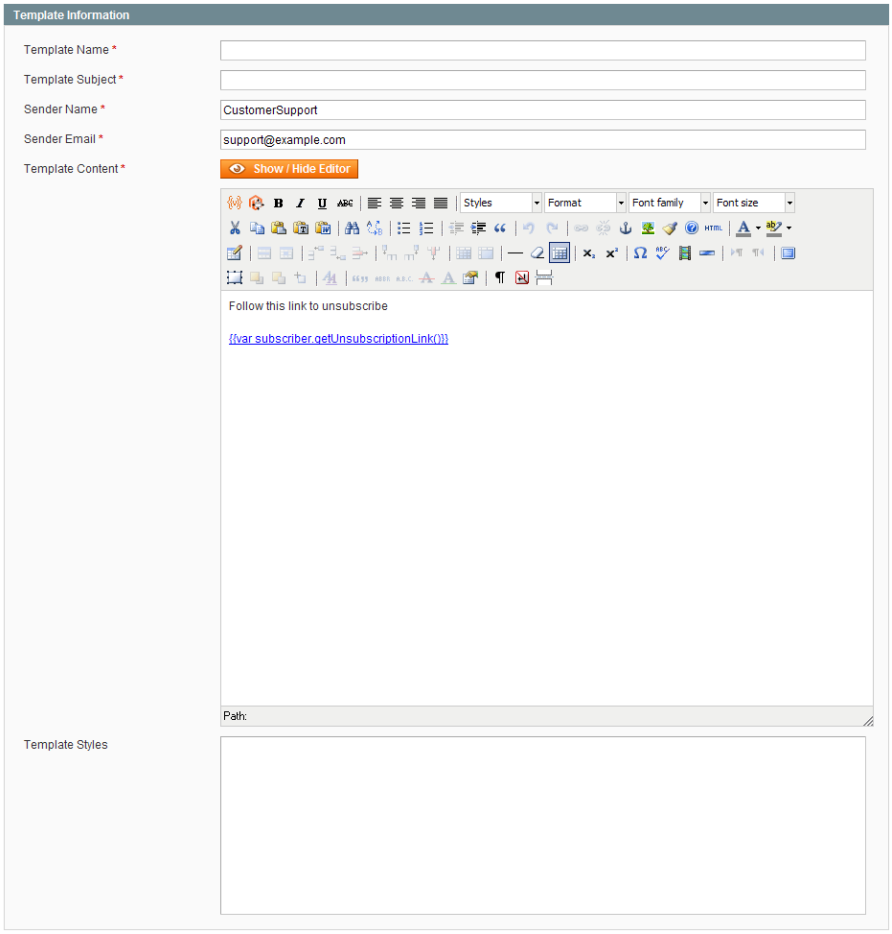



Figure 210. New Newsletter Template Page

3. In the **Template Name** field, specify a unique and indicative name for this template. This value is not visible for customers.
4. In the **Template Subject** field, specify the subject of the email to be sent to your customers.
5. In the **Sender Name** and **Sender Email** fields, specify the name and email of the sender of the email to be sent to your customers.
6. In the **Template Content** field, use the WYSIWIG editor to compose the body of the email. Note that this field is pre-filled with tags showing an unsubscribe link in the email. We recommend that you do not remove this link so that all emails that are sent enable your customers to unsubscribe from the newsletter.
7. Click **Preview Template,** to display the content with the formatting as it will be viewed by your subscribers.
8. After you have finished editing the template, click the **Save Template** button to save it.

**Tip:** After you have saved a template, a **Save As** button appears when you edit this template. The **Save As** button enables you to duplicate the template, so that you can make changes and save the template as a new template without affecting the original template. This can save you time because you will not need to re-enter all the template information in order to create a new template. If you already have an existing template that is similar to the new template, simply edit the fields that you require, and then use the **Save As** button to create a new template.

## Newsletter Queues

A newsletter that has many recipients must be sent in stages. The process of sending the newsletter is managed by a queue. After you start this queue, Magento CE sends the emails in packs.

### To send your newsletter using a queue:

1. In the Admin Panel, select **Newsletter > Newsletter Templates** to display a list of newsletter templates.
2. In the **Action** drop-down list for the relevant template, select the **Queue Newsletter** option.
3. In the **Queue Date Start** field, specify when the newsletter will start being sent.
4. In the **Subscribers From** field, select one or more store views whose customers this newsletter will be sent to.
5. Review the template and parameters and then click the **Save Newsletter** button to schedule sending the newsletter.

**Tip:** To ensure delivery of your newsletters, it is recommended that you integrate your Magento CE installation with a third-party newsletter provider. These services are “whitelisted” by email service providers. Look for newsletter providers in the Magento Connect website.

## Newsletter Reports

Three newsletter reports are provided in the **Newsletter** menu:

- **Newsletter Queue:** Shows the newsletter queues that have been defined and indicates their progress in sending emails.
- **Newsletter Subscribers**: Shows a list of customers that have subscribed to your newsletter. It also enables you to unsubscribe these customers manually.
- **Newsletter Problem Reports**: Shows a list of errors that have occurred while sending the email. This Report enables you to remove the incorrect emails from the subscribers list.

# 13 Managing Orders and Customers

This chapter describes how to manage customer records and how to add orders from the backend.

## Managing Customers

### Viewing and Editing Customers

#### To view existing customers:

1. In the Admin Panel, select **Customers > Manage Customers** to display the Manage Customers page, as shown in Figure 211. The Manage Customers page contains a list of all the customers that opened accounts in your web store or were added using the **Add New Customer** feature.

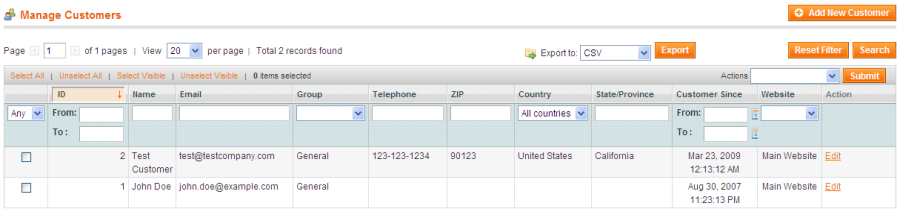



Figure 211. Manage Customers Page

2. Click the **Edit** link on the right side of a customer's row to display the customer information page, as shown in Figure 212.

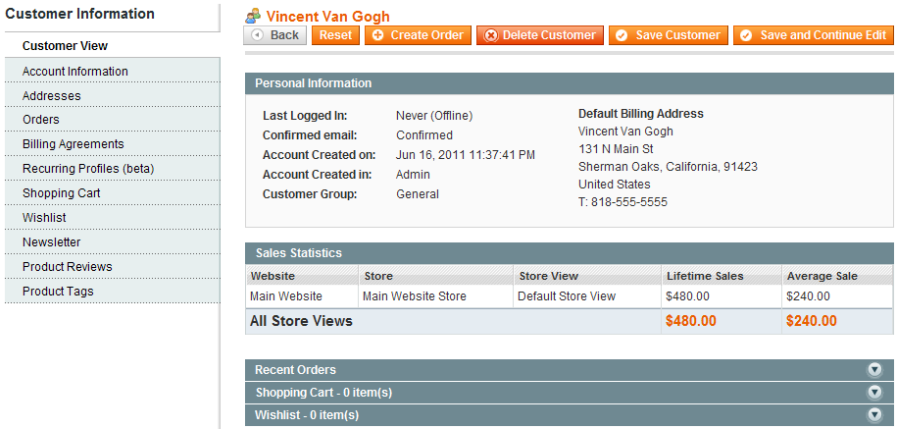



Figure 212. Customer Information Page

The tabs in the left panel provide a variety of types of information about the customer and for handling the relationship with a customer, such as: when the customer last logged in and out, addresses, ordering statistics, recent orders, current shopping cart contents, their last reviews, the newsletter to which they subscribed and so on.

## Adding a Customer

Customers typically register themselves in your web store using the **My Account** link in the header of each page. In addition, you can use the following procedure to add a customer using the backend.

### To add a new customer:

1. In the Admin Panel, select **Customers > Manage Customers**.
2. Click the **Add New Customer** button to display the New Customer page, as shown in Figure 213.

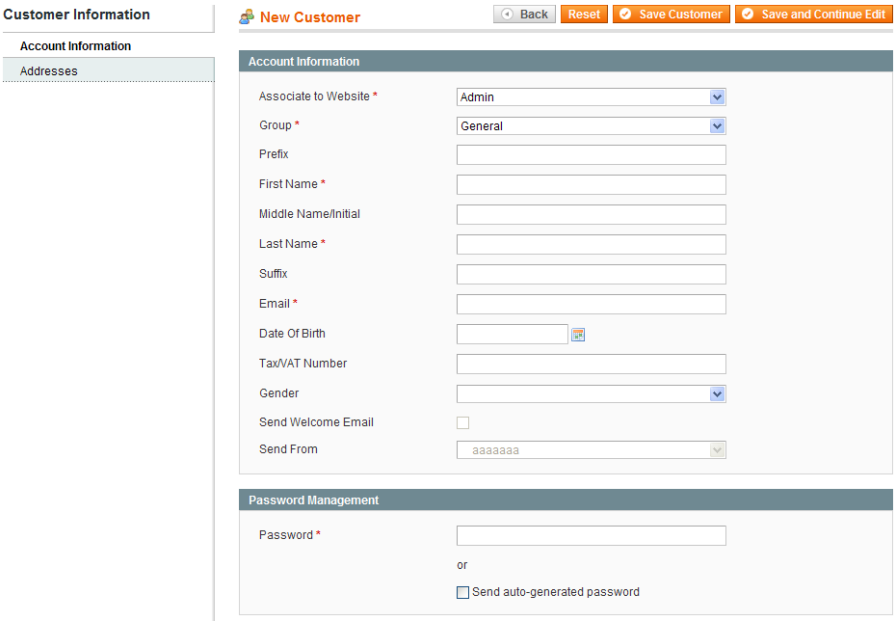



**Figure 213. New Customer Page**

This page enables you to define basic identifying information about the customer and his/her various addresses. Many aspects of the information retained about a customer in Magento CE can be accessed by editing the customer's information, as described in "Viewing and Editing Customers," page 219.

3. The fields on this page are self-explanatory. Specify the customer's information and then click the **Save Customer** button.

## Managing Customer Groups

The customer group to which the customer belongs determines which discounts are given to this customer, as defined in the **Catalog Price Rules** and **Shopping Cart Price Rules** (described in the "Catalog and Shopping Cart Price Rules," page 189), and the tax rule that is applied to that customer.

### To create and edit customer groups:

1. In the Admin Panel, select **Customers > Customer Groups** to open the Customer Groups page, as shown in Figure 214.

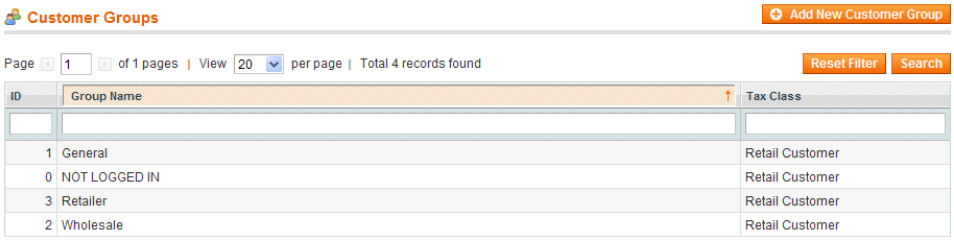



**Figure 214. Customer Groups Page**

2. Do one of the following:
   - To create a new customer group, click **Add New Customer Group**.
   - To edit an existing customer group, click the row for the desired group.

   The customer group editing page opens, as shown in Figure 215.

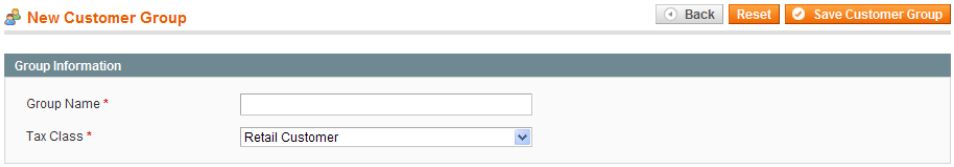



**Figure 215. New Customer Group Page**

3. Specify a unique name for this customer group (or modify the existing name).
4. Select a tax class to associate with this group.
5. Click **Save Customer Group.**

## Checking Online Customers

You can check which customers are currently online and view their activity.

### To view online customers:

In the Admin Panel, select **Customers > Online Customers** to display the Online Customers page, as shown in Figure 216.

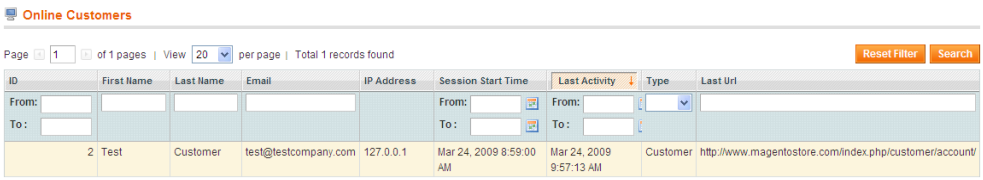



**Figure 216. Online Customers Page**

# Customer Reports

A variety of customer reports can be generated by selecting **Reports > Customers** in the Admin Panel.

The following describes the available customer reports:

- **New Accounts:** Shows the customers that have opened accounts in your web store during the period that you specify.
- **Customer by orders total**: Lists customers in descending order of money spent in your web store.
- **Customer by number of orders**: Lists customers in descending order of number of orders placed in your web store.

# Importing and Exporting Customer Information

Another way to add customer records to Magento CE is by importing the data from a comma-separated values (CSV) file. The file that you upload must be in Comma-Separated Values (CSV) format. Most spreadsheet and database applications can read and create CSV files. This feature is convenient if you have existing customer information in another system and you want to bring it into Magento CE.

In order to import a CSV file into Magento CE, it must have certain characteristics. Specifically, each column heading must exactly match the Attribute Code for the attribute in that column. An easy way to get the correct column headings is to export the existing Magento CE customer data to a CSV file, then add or update the information to the CSV file before re-importing it into Magento CE.

## Exporting Customer Data

### To export customer information:

1. In the Admin Panel, select **System > Import/Export > Export**.
2. Select **Customers** from the **Entity Type** drop-down list. The system generates a list of entity attributes that are relevant to your customers.
3. By default, all attributes are exported to the CSV file. In the Entity Attributes list, select the **Skip** check box for any attributes that you want to exclude from the CSV file.
4. By default, all records are exported to the CSV file. Use the controls in the **Filter** column to limit the records that are exported.
5. Click **Continue** to export your selected product information to a CSV file.
6. Open the saved file in your favorite spreadsheet application and edit as needed.

## Importing Customer Data

With the Import feature, you can upload a file that contains the records for as many customers as you want.

### To import a customer CSV file:

1. In the Admin Panel, select **System > Import/Export > Import** to open the Import page.
2. Select **Customers** from the **Entity Type** drop-down list.
3. Select one of the **Import Behavior** options from the drop-down list:
   - **Append Complex Data:** Adds new or edited products to your store's database. Magento CE will not create duplicate entries for existing products and customers included in your CSV file.
   - **Replace Existing Complex Data:** Completely replaces your existing data or portions thereof.
   - **Delete Entities:** Completely deletes your existing database or portions thereof.
4. Click **Browse** and locate the CSV file in your local computer's file system.

   **Note** The total size of the CSV file must not exceed the maximum size for your environment (typically 32 MB) and must be saved with UTF-8 encoding. Check your spreadsheet or database application documentation for information about saving a CSV file with UTF-8 encoding.

5. Click **Check Data** to validate the uploaded file.
6. If the uploaded file is valid, a "File is valid!" response appears. Import your products or customers by clicking **Import**. If your file contains errors, Magento CE notifies you of the errors and enables you to skip the erroneous rows and importing the valid products or customers by clicking **Import**.

When the import is complete, the "Import was successfully done" message appears.

# Managing Orders

The section "Managing Orders, page 62, introduces the procedures for handling the day-to-day order management tasks in your web store. This section assumes that you are familiar with that information.

See "Viewing the Orders in Your Web Store," page 63 for a description of how to view and edit the Orders in your web store. This section goes into more details about the order life cycle in Magento CE.

# Orders Terminology

This section describes some of the terms used for handling orders in Magento CE. In addition to creating orders, there are many features in the Magento CE backend that are part of the process of managing and fulfilling orders, such as creating invoices, shipments, and credit memos, and editing and cancelling orders.

## Sales Order

When an order is created in a Magento CE web store, either in the frontend or in the backend, a sales order record is created to record this transaction. This sales order can be seen in the orders list by selecting the **Orders** option from the **Sales** menu in the backend.

This is only a temporary record. Payment has not yet been processed and the order can still be canceled.

## Invoice

An invoice is a record of the receipt of payment for an order.

> **Note:** In some cases, payment is automatically received during the creation of an Invoice.

Creating an invoice converts the temporary sales order into a permanent record of an Order, which can no longer be canceled.

Multiple invoices can be created for a single order, each containing as much or as few of the purchased products that you specify.

## Shipment

A shipment is a record of the products in an order that have been shipped. As with invoices, multiple shipments can be associated with a single order, until all of the products in the order are shipped.

## Credit Memo

A credit memo is a record of a refund. A product cannot be refunded until it has been paid (which means that it has been invoiced). This means that you are not able to create a credit memo before an invoice has been created.

The credit memo serves as a record of a refund, but it is not a record of the actual return of funds to the customer.

# Creating New Orders

This section describes how to create an order using the backend, such as when an order is received on the phone.

To create a new order from the backend:

1. In the Admin Panel, select **Sales > Orders.**
2. Click the **Create New Order** button on the top right of the page to display the Create New Order page, as shown in Figure 217.

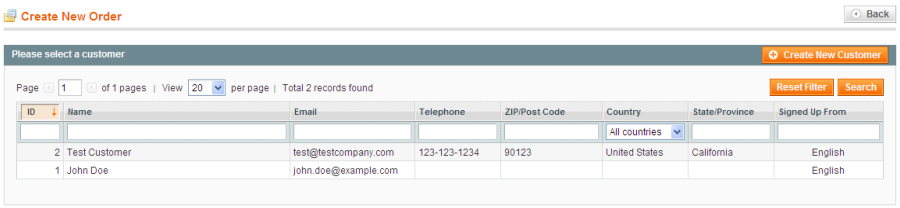



Figure 217. Create New Order Page

3. Select a customer If you have multiple websites, stores, or store views, select the one to which this order applies. The Create New Order for *<customer>* page opens, as shown in Figure 218.

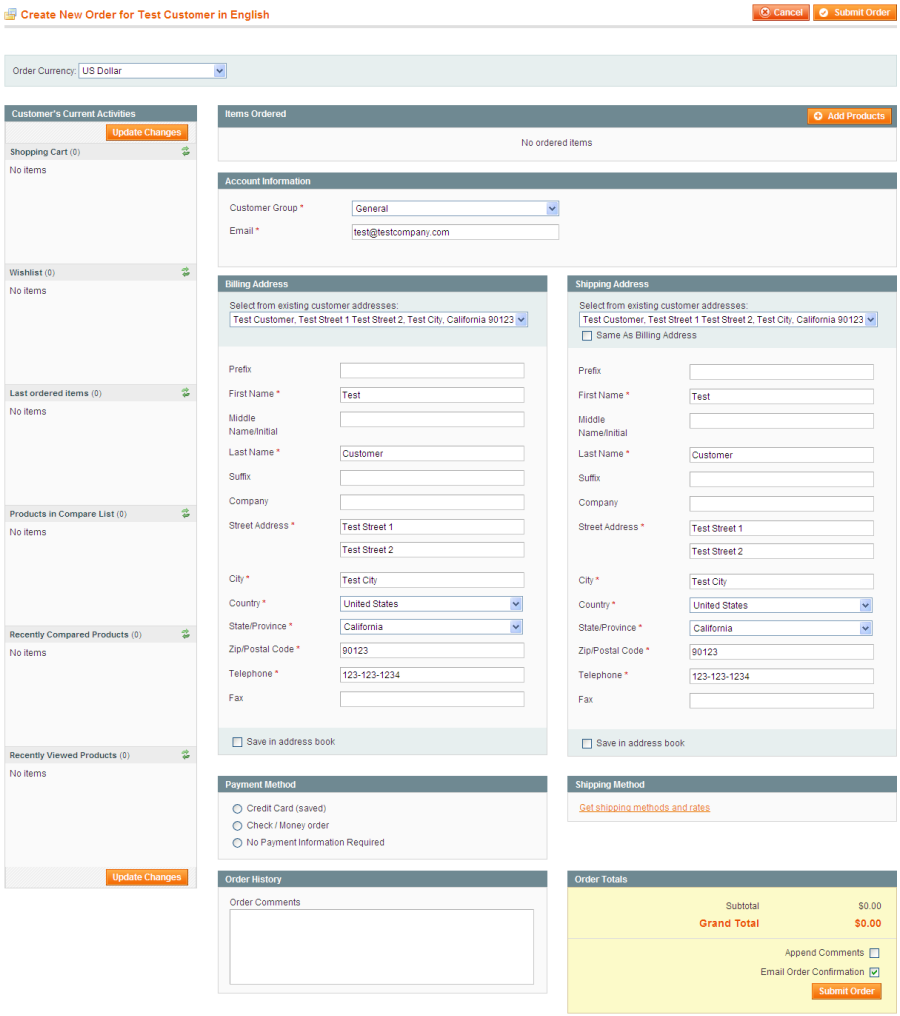



Figure 218. Create New Order for *<customer>* Page

**Note:** If the customer does not already exist in your customer records, click **Create New Customer** on the first Create New Order page. You will need to complete all the address information.

4. Click the **Add Products** button to display the list of products, as shown in Figure 219.

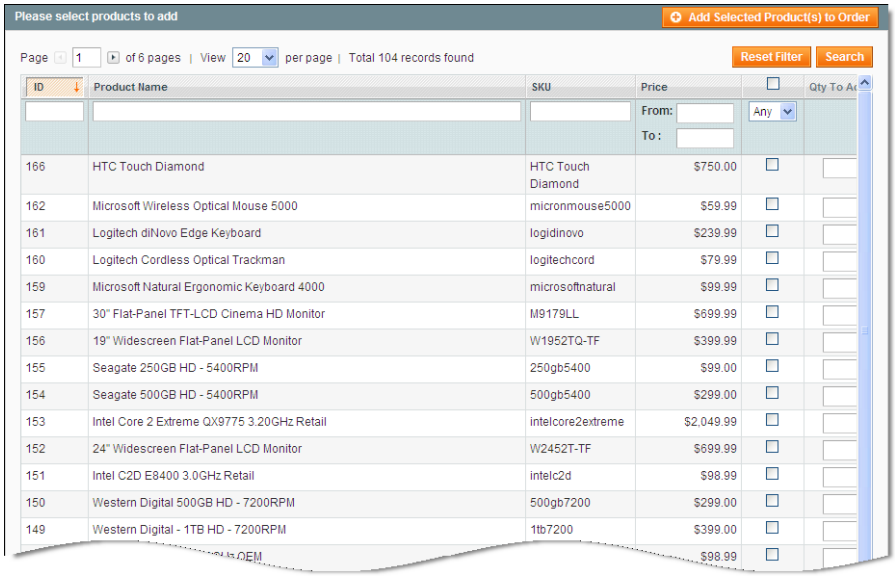

Please select products to add
Add Selected Product(s) to Order
Page 1 of 6 pages | View 20 per page | Total 104 records found
Reset Filter
Search
ID
Product Name
SKU
Price
From:
To:
Any
166 HTC Touch Diamond HTC Touch Diamond $750.00
162 Microsoft Wireless Optical Mouse 5000 micronmouse5000 $59.99
161 Logitech diNovo Edge Keyboard logidinovo $239.99
160 Logitech Cordless Optical Trackman logitechcord $79.99
159 Microsoft Natural Ergonomic Keyboard 4000 microsoftnatural $99.99
157 30" Flat-Panel TFT-LCD Cinema HD Monitor M9179LL $699.99
156 19" Widescreen Flat-Panel LCD Monitor W1952TQ-TF $399.99
155 Seagate 250GB HD - 5400RPM 250gb5400 $99.00
154 Seagate 500GB HD - 5400RPM 500gb5400 $299.00
153 Intel Core 2 Extreme QX9775 3.20GHz Retail intelcore2extreme $2,049.99
152 24" Widescreen Flat-Panel LCD Monitor W2452T-TF $699.99
151 Intel C2D E8400 3.0GHz Retail intelc2d $98.99
150 Western Digital 500GB HD - 7200RPM 500gb7200 $299.00
149 Western Digital - 1TB HD - 7200RPM 1tb7200 $399.00
$98.99

Figure 219. Product List for Creating Orders

5. Use the check boxes to select the products to be purchased, and click the **Add Selected Product(s) to Order** button.

**Tip:** If you selected one of the existing customers, then the left column shows a list of the products that this customer has in his/her cart, wish list, recently ordered, viewed, or compared. To add one those products to the order, select the required product and click **Update Changes** button.

6. Complete the other mandatory fields of the order. Mandatory fields are marked by an asterisk (*).
7. You can define many options for the order, such as choosing custom prices for products and applying discount codes.
8. After you have completed all the required order information, click the **Submit Order** button to display the order information page.
9. To confirm payment, click the **Invoice** button to generate an invoice for your review.
10. Review the invoice, and if all is well, click the **Submit Invoice** button at the bottom of the page.
11. When you are ready to ship the products, click the **Ship** button to generate a Shipment document.

12. If applicable, you can add a tracking number received from the shipping service by clicking the **Add Tracking Number** button. Adding a tracking number enables customers to view the status of their shipment using the shipping carrier's website.
13. Review the shipment. You can modify the quantity to be shipped if only part of the order is ready.

    The order status changes to **Completed** after all its products have been shipped.
14. Click the **Email Copy of Shipment** option to automatically send an email to notify the customer that the products were shipped.
15. Click the **Submit Shipment** button at the bottom of the page.
16. Click the **Back** button to return to the orders page, where you can create additional Orders if needed.

## Clearing the Shopping Cart

If, at any time during the ordering process, the customer decides not to move forward with the order, you can clear the customer's shopping cart in either of two ways:

- Click the **Clear Shopping Cart** button on the Create New Order page (see Figure 220).

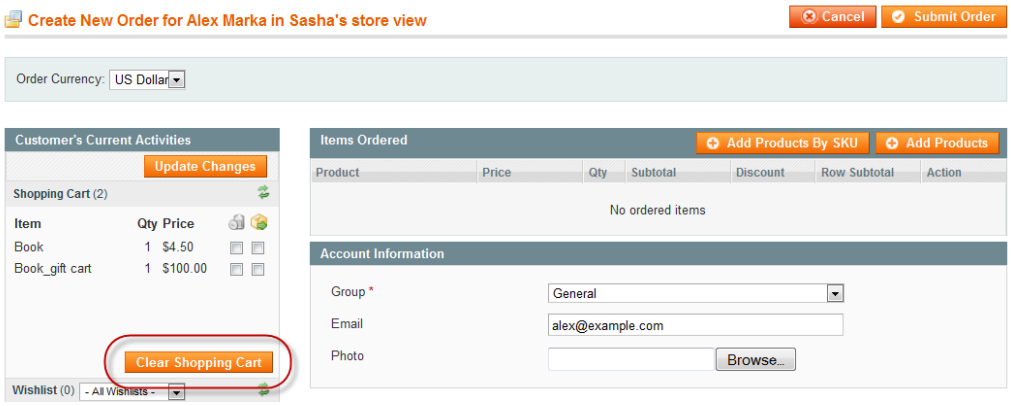



**Figure 220. Clearing the Shopping Cart on the Create New Order Page**

- Click the **Clear Shopping Cart** button on the Shopping Cart page (**Customers** > **Manage Customers** > *%customer%* >**Manage Shopping Cart**); see Figure 221.

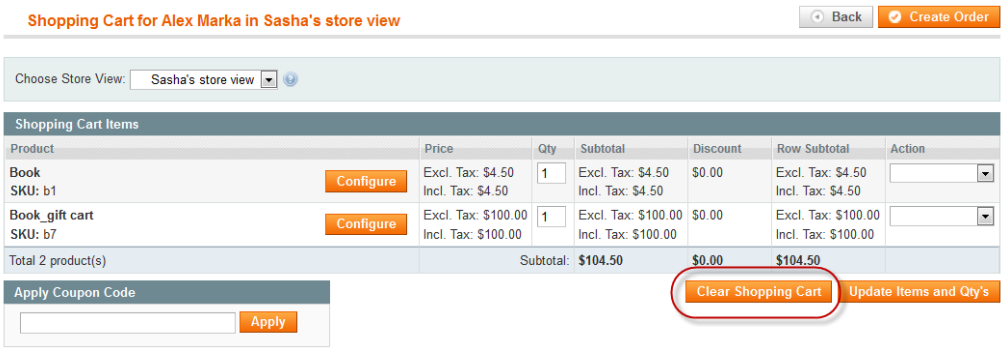



Figure 221. Clearing the Shopping Cart on the Shopping Cart Page

# Refunding

You can create a record of a product refund from an existing order by generating a credit memo.

## To view the list of refunds made in your web store:

From the **Sales** menu, select the **Credit Memos** option to display the Credit Memos page, as shown in Figure 222.

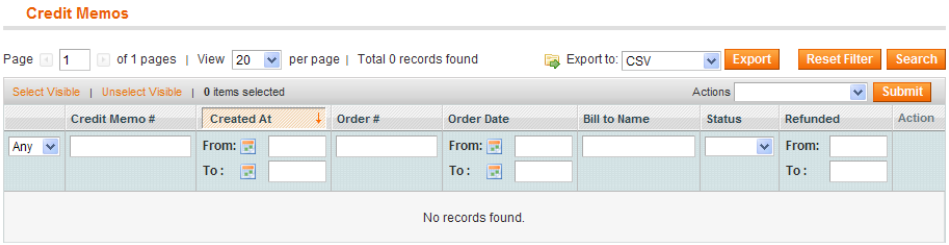



Figure 222. Credit Memos Page

## To refund a product from an existing order:

**Note:** You can create credit memos only for orders for which invoices were created. Without an invoice, an order is assumed not to be paid so that there is nothing to refund.

1. In the Admin Panel, select **Sales > Orders** to display a list of the existing orders.
2. Click the **View** link on the right side of the row of the desired order to display the order view page.
3. Click the **Credit Memo** button to generate a credit memo.
4. Scroll down to the **Items to Refund** area, and in the **Qty to Refund** field of each relevant product, specify the quantity of products to refund.
5. To specify that this product was actually returned to the web store, select the **Return to Stock** check box, as shown in Figure 223.

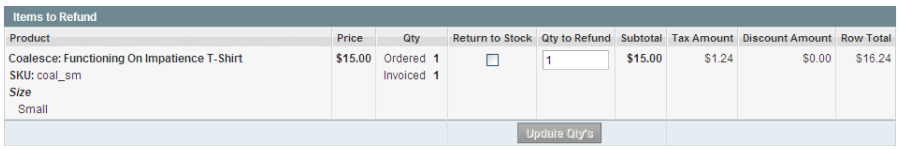



Figure 223. Items to Refund

6. (Optional) Select the **Email Copy of Credit Memo** check box, as shown in Figure 224, to automatically send an email to the customer that the order has been refunded. You can also adjust the refund totals to match your business rules.

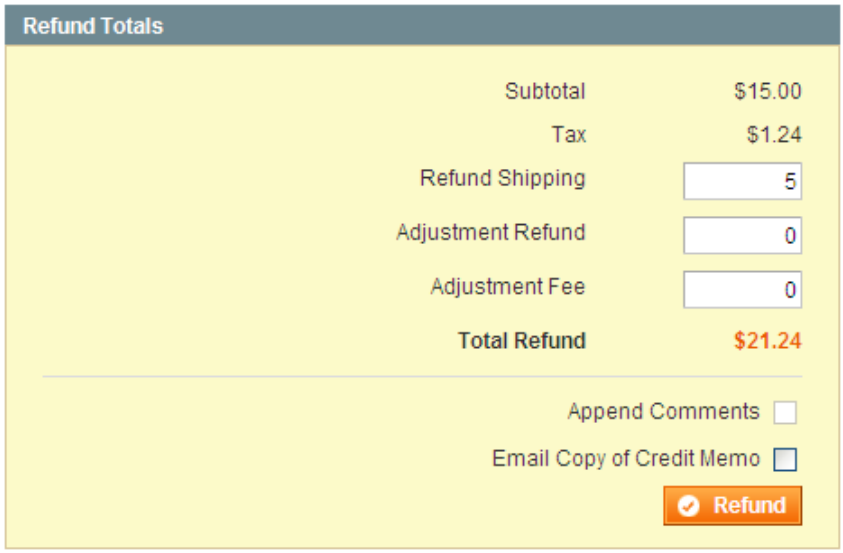



Figure 224. Refund Totals

7. Click the **Refund** button at the bottom of the page. The total of the order from which this product was refunded is updated automatically.

8. Click the **Back** button to return to the orders page where you can create additional orders, if required.

9. **Note:** Refunding an order in Magento CE does not cause an actual payment refund. You must refund the payment on your own. The credit memo is only a record used to track the refunds and to provide proper values in the reports.

# 14 Managing Customer-Generated Content

This chapter describes how to manage customer generated content, such as ratings, reviews, tags, and polls.

## Managing Ratings and Reviews

Rating and review functionality is provided by Magento CE to enable customers and web store owners to give their opinions, feedback, and comments about products. Ratings and reviews appear in the frontend, as shown in Figure 225.

Coalesce: Functioning On Impatience T-Shirt
2 Review(s) | Add Your Review
Availability: In stock.
$15.00
Add to Wishlist | Add to Compare
Quick Overview
6.1 oz. 100% preshrunk heavyweight cotton
Shoulder-to-shoulder taping
Double click on above image to view full picture

Figure 225. Ratings and Reviews Links on the Frontend

The quantity of stars indicates the satisfaction rating. You can click on the **Review(s)** link to display the actual reviews provided by customers or input your own Review, as shown in Figure 226.

Figure 226. Customer Reviews Frontend Interface

To add a review, the customer clicks on the **Add Your Review** link on the product information page to open the Write Your Own Review page, as shown in Figure 227.

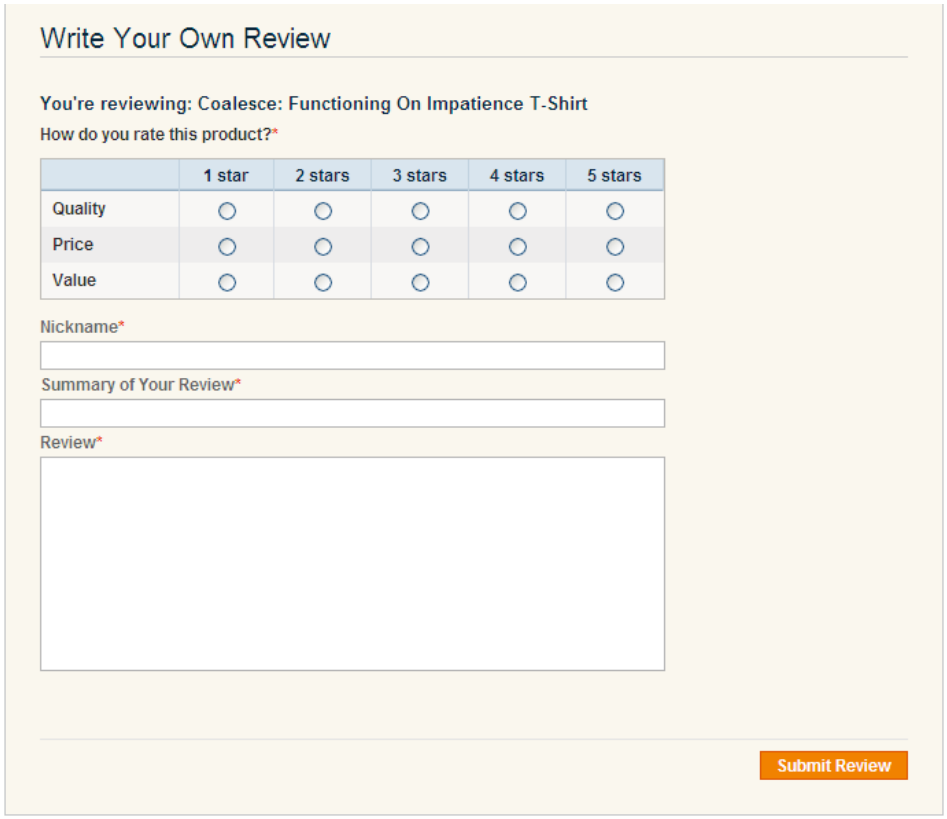



Figure 227. Write Your Own Review Page (Frontend)

## Adding a Custom Rating

By default, the customer can rate the quality, price, and value of a product. You might want to add custom ratings, to enable customers to rate such aspects as durability, warranty, and so on. This section describes how to create a new customized rating.

1. In the Admin Panel, select **Catalog > Reviews & Ratings > Manage Ratings** to display the Manage Ratings page, as shown in Figure 228.

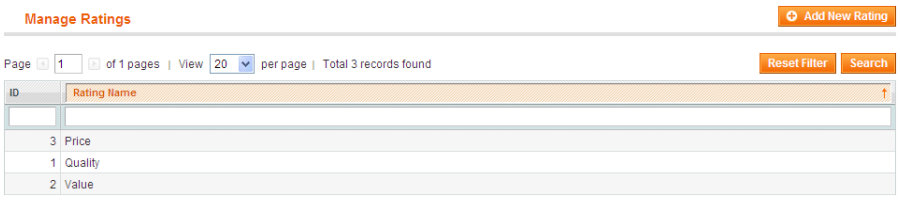



Figure 228. Manage Ratings Page

2. Click the **Add New Rating** button to display the New Rating page, as shown in Figure 229.

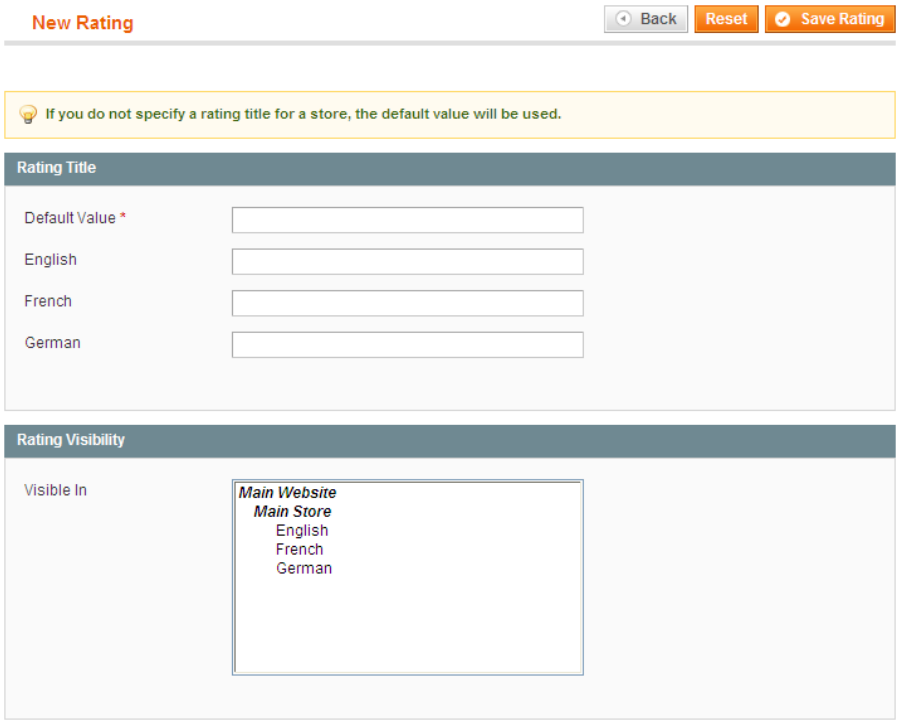



Figure 229. New Rating Page

3. In the **Default Value** field enter a name for this rating.
4. Click the **Save Rating** button.

## Approving Reviews for Public Viewing

New reviews that are submitted by customers must be approved by the web store administrator in the backend before they appear on the frontend.

### To view and approve new reviews:

1. In the Admin Panel, select **Catalog > Reviews & Ratings** > **Customer Reviews > Pending Reviews** to display the Pending Reviews page, as shown in Figure 230.

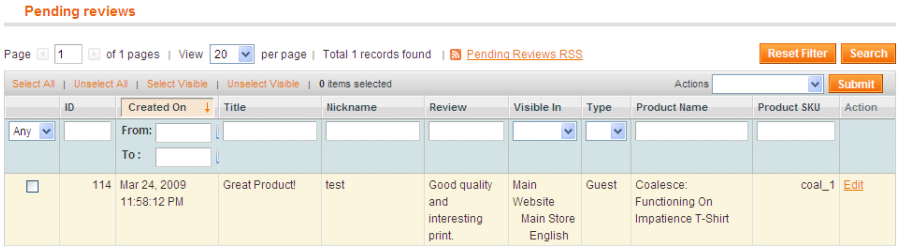



Figure 230. Pending Reviews Page

2. Click the **Edit** link on the right side of the relevant review's row to display the Review Details page, as shown in Figure 231.

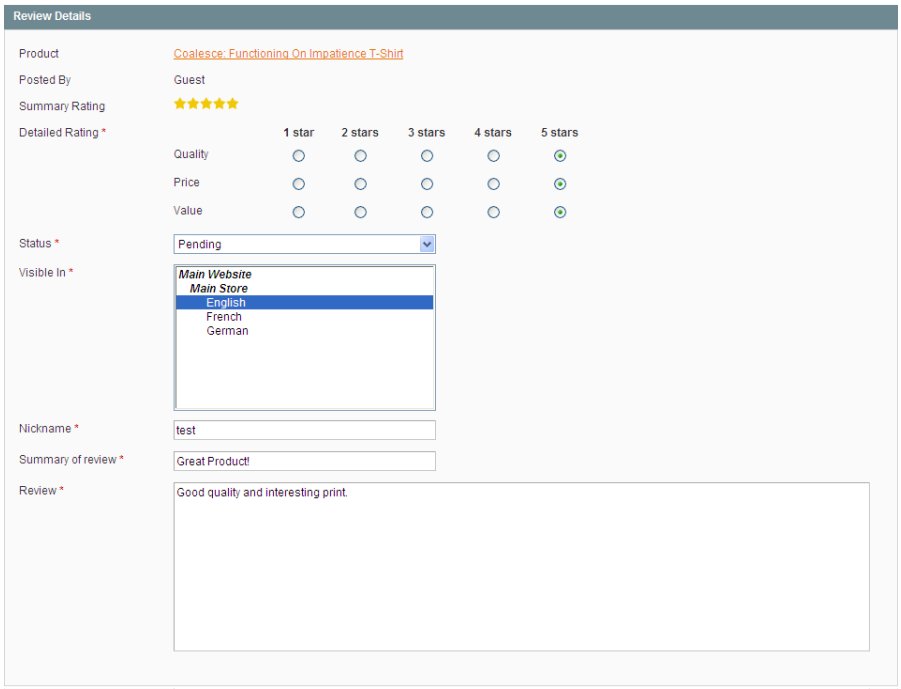



Figure 231. Review Details Page

3. You can modify the review, if required.
4. In the **Status** field, change the **Pending** status to **Approved** or **Not Approved**.

# Managing Tags

Tags can be assigned by customers directly in the frontend. A tag describes a specific property of a product, such as Cool, Valentine's gift and so on. Popular Tags serve as a descriptor that customers can select in order to view the products to which a specific tag has been assigned. Figure 232 shows an example of various tags as they appear in the web store.

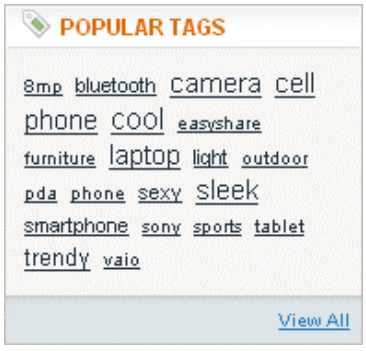



Figure 232. Tags Display in the Frontend

# Adding Tags

The number of tags that can be added to a product is unlimited and they can later be renamed or deleted. To add one or more tags to a product, the customer scrolls down on the product page to the Product Tags section, as shown in Figure 233.

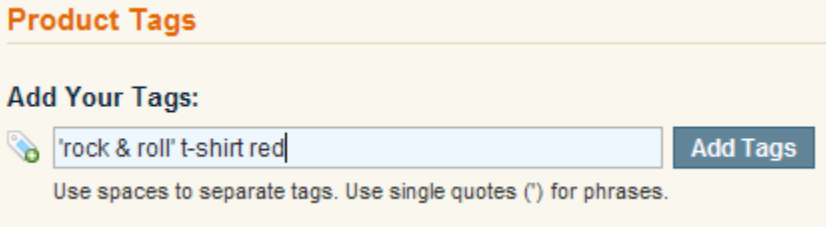



**Figure 233. Adding Product Tags (Frontend)**

Tags must be separated by spaces, and phrases (two or more words that comprise a single tag) must be enclosed in single quotation marks (').Figure 233 shows what it looks like when a customer adds three tags:

- rock and roll
- t-shirt
- red

After a customer submits product tags, an administrator has to approve them on the backend so that they will appear on the frontend.

# Approving Tags

Tags must first be approved by the backend administrator before they appear on the front-end. After a tag has been approved by the backend administrator, it can be used for other products and does not need to be approved again.

## To approve a tag:

1. In the Admin Panel, select **Catalog > Tags** > **Pending Tags** to display the Pending Tags page, as shown in Figure 234.

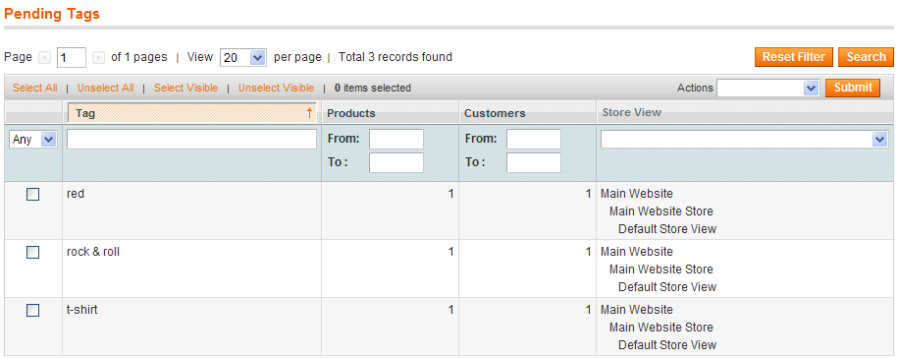



**Figure 234. Pending Tags Page**

This page shows a list of tags that have not yet been approved.

2. Use the check boxes in the left column to select all of the tags that you want to approve (or all of the tags that you want to disable).
3. In the **Action** drop-down list, select **Change Status**. The **Status** drop-down list becomes visible.
4. In the **Status** drop-down list, select **Approve** (or **Disable**).

**Note:** To modify a tag or view details about a tag, such as the product or products it was applied to, or the name of the customer who submitted it, click the row for that tag.

**Note:** If a customer has entered a tag that you do not want to ever see again, simply change the status to **Disabled**.

# Managing Polls

Polls provide a powerful marketing tool for finding out the opinion of your customers about your products, store, customer service, or anything else.

It is very simple to create a poll. Figure 235 shows an example of how a poll appears in the frontend.

Figure 235. Poll on the Frontend

A poll occupies only a small amount of space on your store pages and is shown in the right column by default. Poll results are immediately displayed to the customer after the customer submits an answer, as shown in Figure 236.

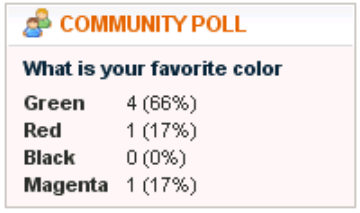



Figure 236. Poll Results

## To create a poll:

1. In the Admin Panel, select **CMS > Polls** to open the Poll Manager page, which shows a list of existing polls.
2. Click the **Add New Poll** button in the top right corner of the page to display the New Poll page, as shown in Figure 237.

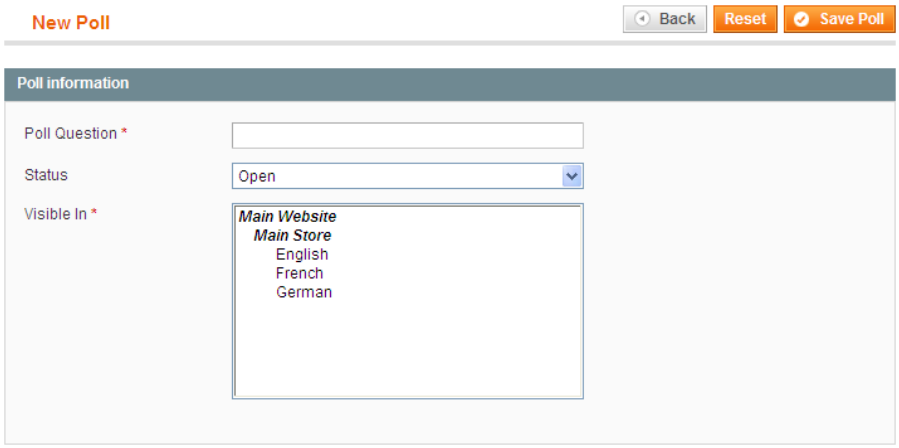



Figure 237. New Poll Page

3. In the **Poll Question** field, enter the question that your customer will be asked.
4. In the **Status** field, specify whether the poll is **Open** or **Closed**. The status of the poll is **Open** by default, which means that it appears in your store. If you do not want it to appear in your store, select the **Closed** option.
5. Select one or more stores that you want the poll to appear in.
6. Click the **Poll Answers** option in the left panel to display Assigned Answers page.
7. Click the **Add New Answer** button to add possible answers to your question that can be selected by customers, as shown in Figure 238.

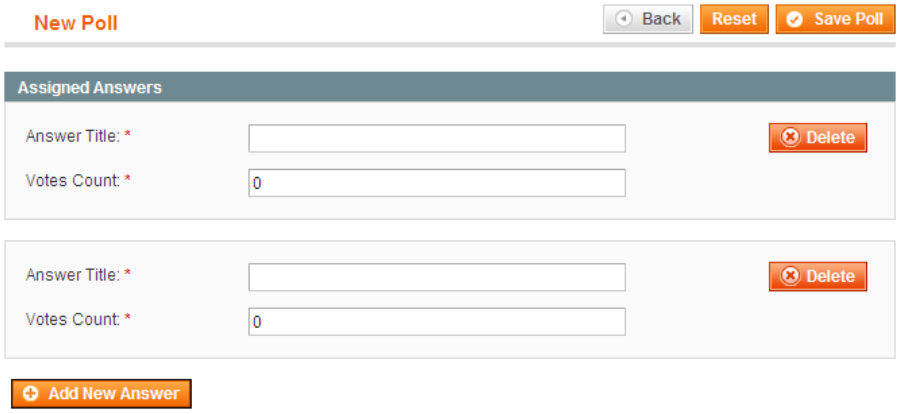



Figure 238. Assigned Answers Page

8. In the **Answer Title** field, specify the text of the answer to appear in your store for customers to select.

9. To influence the poll results in advance, you can add votes to the count in the **Votes Count** field, which is 0 by default.
10. Repeat steps 7 through 9 for each answer that you want to appear in this poll.
11. Click the **Save Poll** button.

Customers can answer a poll only once and you can view the results in the backend by clicking on the row for the poll in the Poll Manager page. If you have multiple polls open, they will cycle randomly in the frontend, meaning customer may see a different poll every time they refresh a frontend page.

## Editing a Poll

After a poll has been created, you can edit it by clicking on the roll for the poll in the Poll Manager page (**CMS >** Polls).selecting the **Poll Manager** option from the **CMS** menu.

To close the poll so that it no longer appears in the store, change the **Status** field to **Closed** in the **Poll information** section.

To see the votes that have been tallied for each answer, click the **Poll Answers** option in the left panel to display the number of votes in the **Vote Count** field, as shown in Figure 239.

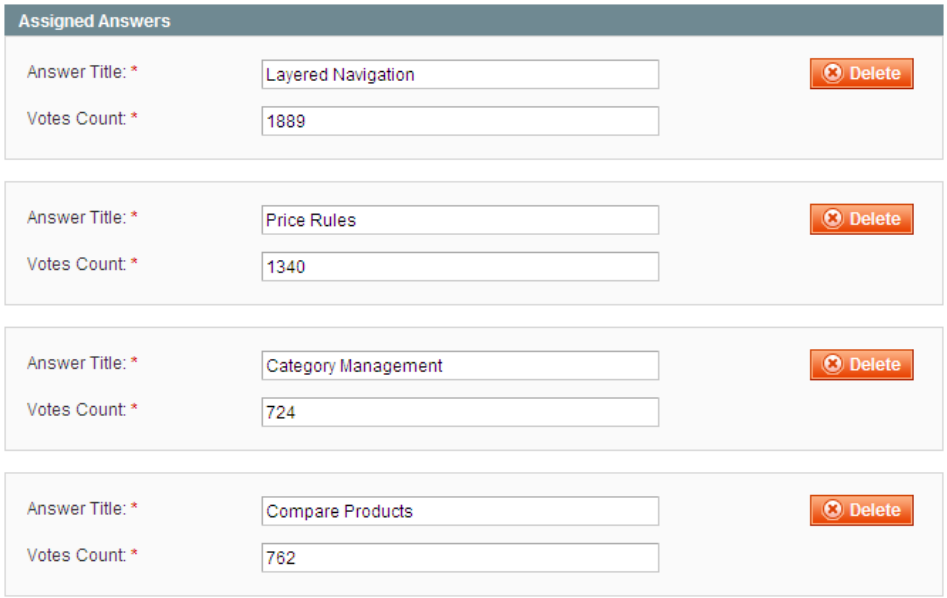



Figure 239. Poll Results (Backend)

# 15 Monitoring and Improving the Web Store

This chapter describes how to monitor and improve your web store by using reports, search terms, synonyms, redirects, and Google Analytics

## Reports

This section describes some of the most important reports in Magento CE. This section first provides a full description of how to generate a Sales Report and a brief description of other important reports.

### Generating Reports

Magento CE provides a variety of reports that you can access at any time. To see the reports that you can generate in Magento CE, from the **Reports** menu, select a type of report and then select a specific report of that type.

Some report pages have filter controls that enable you to narrow the scope of the report, as shown in Figure 240.

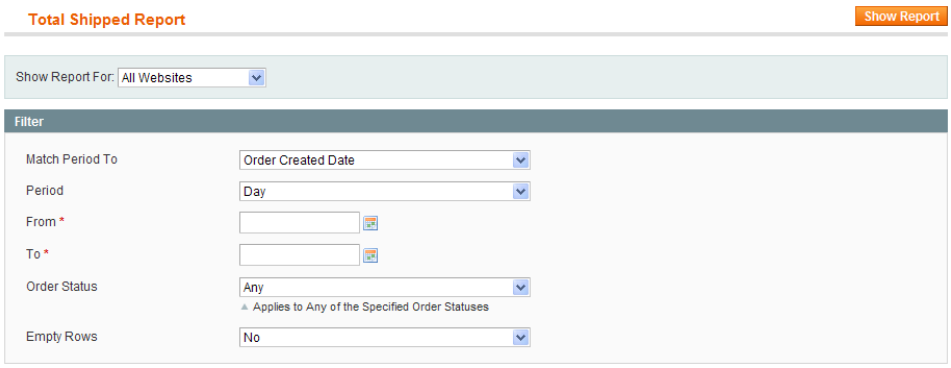



**Figure 240. Report Filter Controls**

- The **Show Report For** drop-down list enables you to select the store view or website (or all websites) to report on.
- The **Match Period To** drop-down list enables you to select which records to report on, based on either the order creation date or the order modified date.
- The **Period** drop-down list enables you to aggregate the report data into rows for each day, month, or year within your report **From** and **To** dates.
- Use the **From** and **To** calendar controls to determine the start and end dates that will be covered by the report.
- For **Order Status**, select **Any** to include all orders, or select **Specified** to select one or more order status values from a list.

- The **Empty Rows** drop-down list enables you to select whether to include date period rows that have no data.
- The **Show Actual Values** drop-down list enables you to select whether to display actual (**Yes**) or projected (**No**) values. Projected values are based on estimates of amounts to be paid.

When you are finished making filter selections, click **Show Report** (or **Refresh**, in some reports) to generate the report. To export the report information shown on the screen, select the **CSV** (Comma Separated Values) option or the **Excel XML** option from the **Export to** drop-down list, and click **Export**.

## Refreshing Sales Report Statistics

To reduce the performance impact of generating sales reports (those that are available under **Reports > Sales**), Magento CE calculates and stores the required statistics for each report. When you generate a report, the report uses the stored statistics, rather than recalculating the statistics each time you generate a report.

The sales report statistics need to be refreshed in order for the reports to use the most recent data. Refreshing the sales report statistics is a manual process.

### To refresh the Sales Report statistics:

1. In the Admin Panel, select **Reports > Refresh Statistics** to open the Refresh Statistics page, as shown in Figure 241.

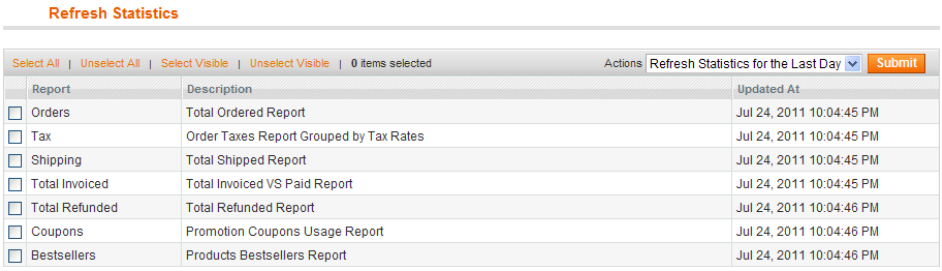



**Figure 241. Refresh Statistics Page**

2. Use the check boxes on the left to select the reports for which you want to have the statistics refreshed.
3. In the **Actions** drop-down list, select the scope of the statistics to be refreshed: **Refresh Lifetime Statistics** or **Refresh Statistics for the Last Day**.
4. Click **Submit**.

## Available Reports

The following describes the reports that are available in Magento CE.

| Report | Path | Description |
|---|---|---|
| Total Ordered | **Reports > Sales >** | Shows orders for the specified time period. |

| Report | Path | Description |
|---|---|---|
| | **Orders** | |
| Order Taxes | **Reports > Sales > Tax** | Shows taxes charged for orders in the specified time period; grouped by tax rate. |
| Total Invoiced vs. Paid | **Reports > Sales > Invoiced** | Shows amounts paid and unpaid for invoiced orders in the specified time period. |
| Total Shipped | **Reports > Sales > Shipping** | Shows orders shipped in the specified time period, grouped by carrier/method; includes shipping charge amounts. |
| Total Refunded | **Reports > Sales > Refunds** | Shows refunds applied to orders in the specified time period. |
| Coupons Usage | **Reports > Sales > Coupons** | Shows coupons used for orders in the specified time period, grouped by coupon code. |
| PayPal Settlement | **Reports > Sales > PayPal Settlement Reports** | Shows PayPal settlements for the specified time period. Click **Fetch Updates** to retrieve data from PayPal. |
| Products in Carts | **Reports > Shopping Cart > Products in carts** | Shows products that are currently in shopping carts. |
| Abandoned Carts | **Reports > Shopping Cart > Abandoned Carts** | Shows shopping carts that were started but then abandoned.<br>**Tip:** This report enables you to contact the customers and offer them discounts or otherwise turn an abandoned cart into a conversion. |
| Products Bestsellers | **Reports > Products > Bestsellers** | Shows the products that were sold in the highest quantity in the specified time period. |
| Products Ordered | **Reports > Products > Products Ordered** | Shows all products that were ordered in the specified time period. |
| Most Viewed | **Reports > Products > Most Viewed** | Shows the products that were viewed the most times in the specified time period. |
| Low Stock | **Reports > Products > Low Stock** | Shows the products whose stock levels are low. |
| Downloads | **Reports > Products > Downloads** | Shows the number of purchases and downloads for each downloadable product. |
| New Accounts | **Reports > Customers > New Accounts** | Shows the new accounts that were created during the specified time period. |
| Customers by Orders Total | **Reports > Customers > Customers by orders total** | Shows the customers listed in descending order of total order amount. |
| Customers by Number of Orders | **Reports > Customers > Customers by number of orders** | Shows the customers listed in descending order of number of orders placed. |
| Customers Reviews | **Reports > Reviews > Customers Reviews** | Shows the customers listed in descending order of number of reviews contributed. |
| Products Reviews | **Reports > Reviews > Products Reviews** | Shows the products listed in descending order of number of reviews. |
| Customers Tags | **Reports > Tags > Customers** | Shows the customers listed with the number of tags each one has created. |
| Products Tags | **Reports > Tags > Products** | Shows the number of unique tags and total number of tags created for each product. |
| Popular Tags | **Reports > Tags > Popular** | Shows the number of times each tag has been applied. |
| Search Terms | **Reports > Search Terms** | Shows the terms that were submitted in the |

| Report | Path | Description |
|---|---|---|
| | | search tool.<br>**Tip:** If you see that the **Hits** field of a product shows a high number (meaning that customers search for it often), but the **Results** column shows a low number or zero, then you should review your product names and descriptions to promote products related to this keyword. |

# Search Synonyms and Redirects

The following shows you how to fine-tune Magento's search behavior. Two mains options are provided:

- **Search Synonyms**: Misspelled search terms may mean missed opportunities for you. If you know that a frequently used search term is often misspelled by customers, and thus does not display results, you can add additional search terms.
- **Redirects**: You can specify that when a customer searches for a certain term that they are re-directed to a specific page. Direct customers to a specific product page, a specific brand landing page, or an informational page. For example, the search term "Returns" can take customers directly to the Shipping Policy page.

The following example demonstrates how to add the misspelled search term "latop" so that the results are returned for the correct term, "laptop."

## To add new search synonym and or redirection:

1. In the Admin Panel, select **Catalog > Search Terms** to display the Search page, as shown in Figure 242.

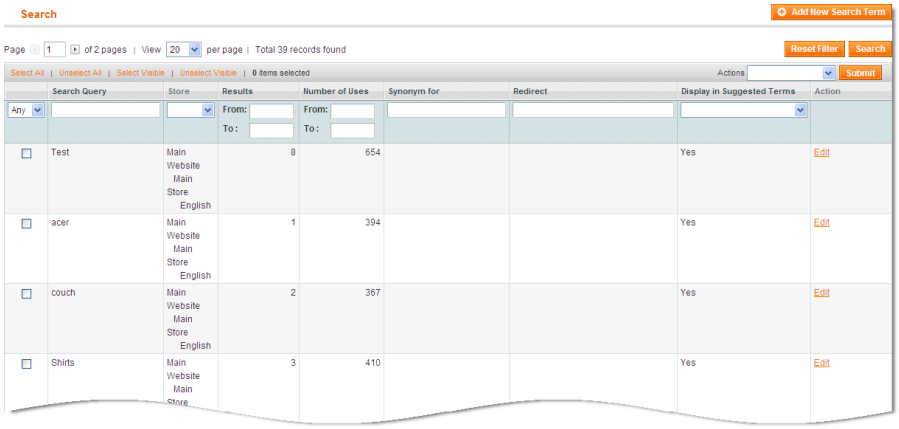



Figure 242. Search Page

2. Click the **Add New Search Term** button to display the New Search page, as shown in Figure 243.

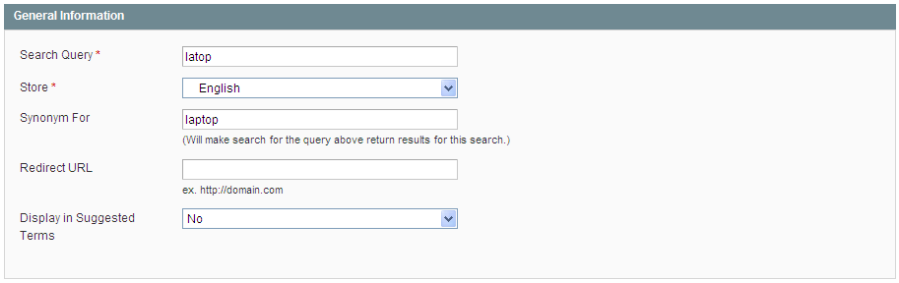



**Figure 243. New Search Page**

3. In the **Search Query** field, specify the incorrect spelling of the term ("latop" in this example).
4. In the **Synonym For** field, specify the correct search term that is defined in your web store ("laptop" in this example).
5. In the **Redirect URL** field, specify the URL to which the customer is redirected when no results are returned for the search term.
6. Click the **Save Search** button.

# Google Analytics

Google Analytics is a free service provided by Google to help website owners find out more about the traffic on their website and about conversions. Magento CE supports both the following Google Analytics options:

- **Page View Tracking:** Enables you to see the origin from which your web store visitors linked to your store.
- **E-commerce Tracking**: Enables you to see which customers make purchases and what they buy.

You can sign up to this service at https://www.google.com/analytics. While signing up, a report is displayed showing your new Google Analytics account number in the following format: UA-XXXXXXX-1. Write this number down, because it is required for configuring Google Analytics in Magento CE.

## To add Google Analytics tracking to Magento:

1. In the Admin Panel, select **System > Configuration > Google API**
2. Expand the Google Analytics section as shown in Figure 244.

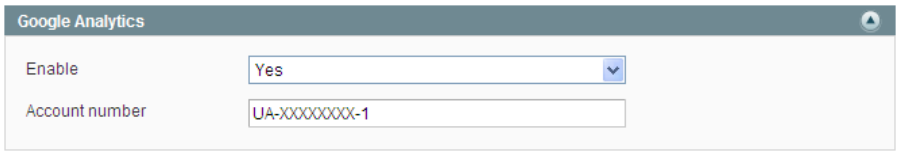



Figure 244. Google Analytics Options

3. In the **Enable** field, select **Yes**.
4. In the **Account number** field, specify the Google Analytics account number that you wrote down when you signed up for the service.

**Tip:** Magento supports native integration with Google Website Optimizer, which is another free service from Google that enables you to test different versions of page elements and to select the elements that provide the best conversion rates.

# 16 Keeping Your Store Healthy

Now that you have your own web store running and are selling products, do not forget to keep it in good condition. Make sure that your hosting provider performs regular file and database backups

This chapter describes what you can do to keep your store healthy by setting up administrator roles and permissions, using backups and rollbacks, using a staging environment, updating Magento CE, and extending Magento CE.

## Limiting Administrator Access to the Admin Panel (Backend)

In Magento CE, you can create individual accounts for each user to whom you want to allow access to the backend Admin Panel. You can even create roles that define which Admin Panel functionality those administrator users will have access to. Additionally, Magento enables you to further restrict that admin access to only a specific site or set of sites and their associated data. If you have multiple brands or business units with separate stores all on the same Magento installation, this feature enables you to provide admin access to each of your business units but to still hide and protect their data from one another.

To limit which websites or stores administrator users can see when they log in to the Admin Panel, you create a role with a limited scope and resources. After you have created a restricted role, you can assign that role to a specific admin user account. Administrator users assigned to a restricted role will be able to see and change data only for websites or stores associated with that role. They will also be unable to change global settings or data.

If an admin user's access is restricted to a specific set of websites and/or stores, the websites and stores for which they are not authorized will not be shown in the scope drop-downs or they will be displayed as inactive. Only the sales and other data for allowed websites and stores will be shown.

### To limit admin role access to specific websites or stores:

1. Choose **System** > **Permissions** > **Roles**.
2. Click on the **[+Add New Role]** button to create a new role.
3. In the **Role Info** tab, specify the following information:
   - **Role Name** (required) - Give the role a descriptive name to help you remember its scope and purpose.
4. Select the **Role Resources** tab in the left column.

- In the **Role Scopes** panel, set the following values:
  - Select **Custom** from the **Role Scopes** drop-down menu.
  - In the resulting list, select the websites and/or stores that you want users with that role to have access to.
- In the **Role Resources** panel, set the following values:
  - Select **Custom** from the **Resource Access** drop-down menu.
  - In the resulting list, select the menus and features that you want users with that role to have access to.

**Important Note:** Be sure to disable access to at least the Permissions tool here in the **Role Resources** section if you are limiting website/store access for a given role. Otherwise, users with this role will be able to modify their own restrictions.

  - If desired, select the **Role Users** tab and assign existing Admin user accounts to this new role.

5. Click the [✔Save Role] button to save your new role.

After creating a restricted role, you can create new administrator users at any time (**System > Permissions > Users**) and assign your new restricted role to the administrator users whose access you want to limit.

# Backups and Rollbacks

Magento CE enables you to perform different types of backups (backup of database, file system, or both) and to perform rollbacks automatically.

## Backup and Rollback Quick Reference

The main tasks related to creating backups and restoring the system are performed in the Magento Admin Panel under **System** > **Tools** > **Backups**.

Files are compressed using the .gz and .tgz formats. Backup files are stored in the `var/backups` directory in your Magento file system. The content of the `/var/cache`, `/var/log`, `/var/session` and `/var/report` folders is excluded from the backup.

## Creating and Managing Backups

### To create a backup:

1. Log in to the Magento Admin Panel.
2. Navigate to **System** > **Tools** > **Backups**.
3. Click one of the following buttons, depending on the backup type you need to create:

- **System Backup:** Creates a complete backup of the database and the file system. On the next step you will have the possibility to choose whether to include the media folder to the backup.
- **Database and Media Backup**: Creates a backup of the database and the media folder.
- **Database Backup**: Creates a backup of the database.

4. The confirmation dialog box appears. If you agree to put the store into the maintenance mode for the time of backup creation, select the corresponding check box. After the backup creation is completed, the maintenance mode is turned off automatically. If you are creating a system backup, select the **Include Media folder to System Backup** check box if you want to include the `media` folder. Confirm the backup creation.

Database backup files are compressed using the .gz format. For the system backups and database and media backups, the .tgz format is used. Backup files are stored in the `var/backups` directory in your Magento file system. The files that are stored in the `/var/cache`, `/var/log`, `/var/session` and `/var/report` folders are excluded from the backup.

Records about all created backups are listed in a grid on the Backups page. Deleting a record deletes the archive file as well.

## Rolling Back the System

### To roll back the whole system or the database:

1. In the Magento Admin Panel, navigate to **System** > **Tools** > **Backups**
2. The Backups page opens, where all previously created backups are listed in a grid. For the desired backup, click the **Rollback** link in the Action column. Note that all changes made since the backup creation will be lost after the rollback.
3. Confirm rolling back, specify your Magento Admin Panel account password, and choose whether you want to put your store into the maintenance mode for the time of rolling back. When restoring file system or database and media files you can choose to use the FTP connection.
4. After the rollback, you are redirected to the login page to log in to the Admin Panel.
5. Refresh cache types and rebuild required indexes. This can be done under **System** > **Cache Management** and **System** > **Index Management**, respectively.

**Important note:** Use the Rollback functionality with caution. Ccustomers who are in the process of checking out when you start the rollback may not be able to complete the checkout.

## Limiting Access to the Backup and Rollback Functionality

Access to the Backups and Rollback functionality management can be restricted by configuring user permissions for Backups and Rollback resources of the Admin Panel for an admin role.

Role permissions are configured under **System** > **Permissions** > **Roles** > *%desired role%*. See Figure 245 for illustration of a role permission tree on the Role Information page.

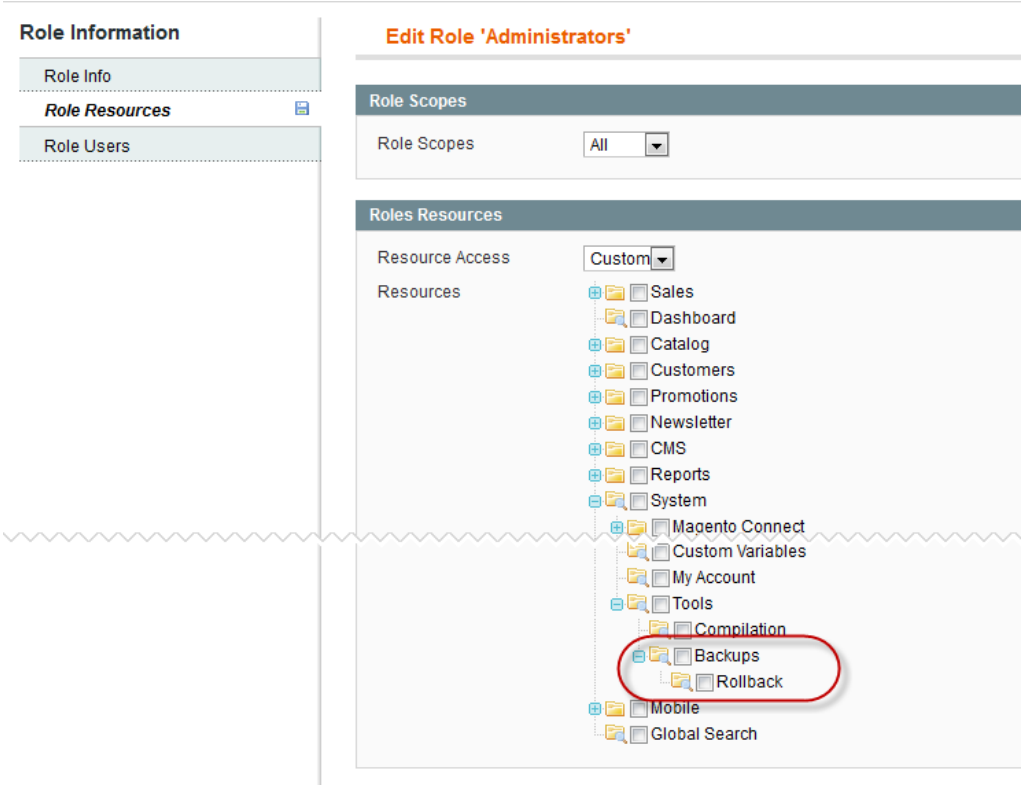



**Figure 245. Defining access permissions to the Backup and Rollback functionality**

To restrict access to the Backup and/or Rollback resources, leave the corresponding check box cleared. If you need to grant access to the Rollback resources, you must grant access to Backup resources as well.

## Creating a Backup from the Magento Connect Manager

In the Magento Connect Manager (MCM), you can choose to create a backup before installing an extension or upgrading Magento.

### To create a backup before installing an extension from MCM:

1. Navigate to **System** > **Magento Connect** > **Magento Connect Manager.**
2. Select the **Create Backup** check box and select the backup type. See Figure 246.

3. Proceed with installing extension or updating Magento. The backup will be created automatically, and will be listed in the grid under **System** > **Tools** > **Backups** in the Magento Admin Panel.

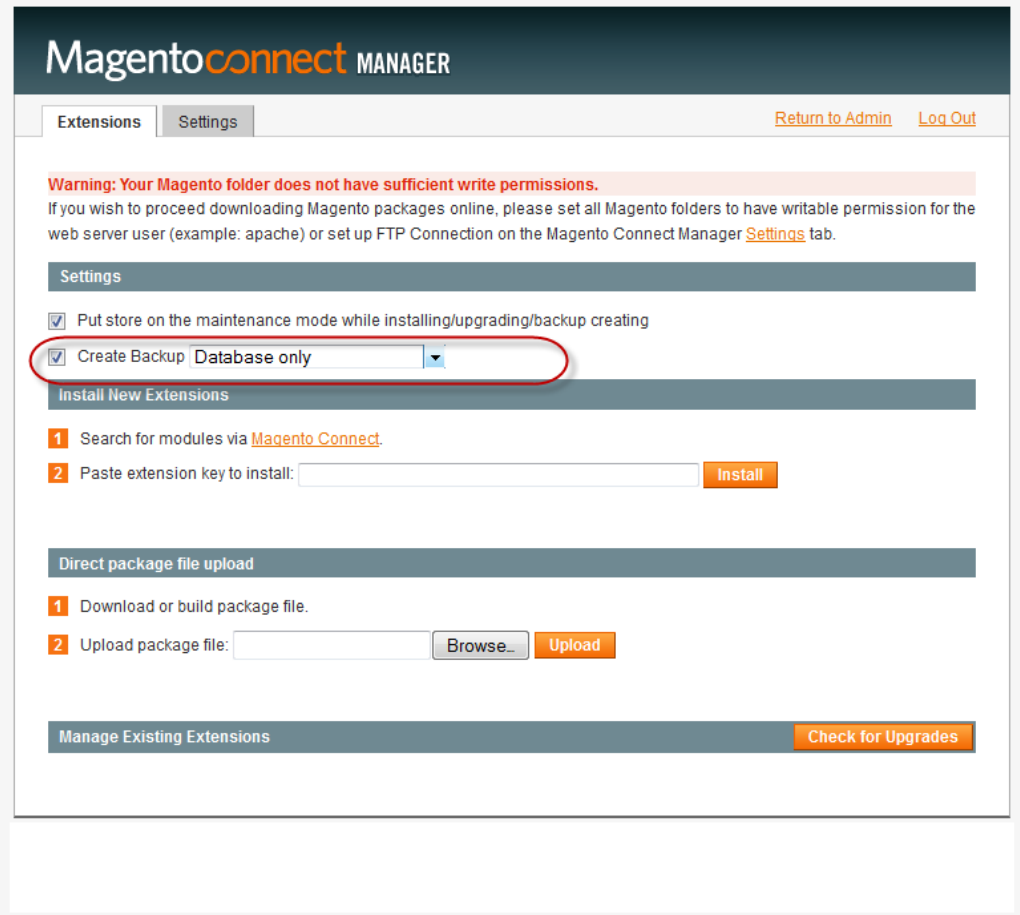

Magentoconnect MANAGER
Extensions
Settings
Return to Admin
Log Out
Warning: Your Magento folder does not have sufficient write permissions.
If you wish to proceed downloading Magento packages online, please set all Magento folders to have writable permission for the web server user (example: apache) or set up FTP Connection on the Magento Connect Manager Settings tab.
Settings
Put store on the maintenance mode while installing/upgrading/backup creating
Create Backup
Database only
Install New Extensions
1 Search for modules via Magento Connect.
2 Paste extension key to install:
Install
Direct package file upload
1 Download or build package file.
2 Upload package file:
Browse...
Upload
Manage Existing Extensions
Check for Upgrades

Figure 246. Selecting to create a backup in Magento Connect Manager

# Staging Environment

If you plan to change and develop your web store over time, we recommend that you set up a staging environment (also called a testing environment) in which you can test your ideas before applying them to the live store. We highly recommend that you also use this environment when updating new versions of Magento CE.

At its simplest, the staging environment is just like any other Magento CE installation that is not accessible to the public. If you are modifying the files, you can keep them synchronized with the live files using any of the various available version control tools.

# Updating Magento CE

Magento CE is constantly evolving. New features are added and problems resolved on an ongoing basis. From time to time you will be notified about a new Magento CE version. This notice will be published in the Magento CE blog and the backend will display a message when you log in. If the update is critical, contains mandatory updates, or resolves issues that you have encountered, you should definitely update your web store.

**Warning:** If your store has a custom theme, when you upgrade it to a new version, you will benefit from the bug fixes, but new front-end functionality may not be visible. Upgrading between major versions, such as between version 1.1 and 1.2, can render your site and any custom functionality unusable until your perform a few minor configuration changes (which are usually noted along with the new version announcement). We strongly recommend that you first test all upgrades in a staging environment before applying it to your live store.

## To update your web store to a new version:

1. In the Admin Panel, select **System > Magento Connect > Magento Connect Manager**.
2. Log in using your backend username and password and click **Log In**. The Magento Connect Manager page is displayed, as shown in Figure 247.

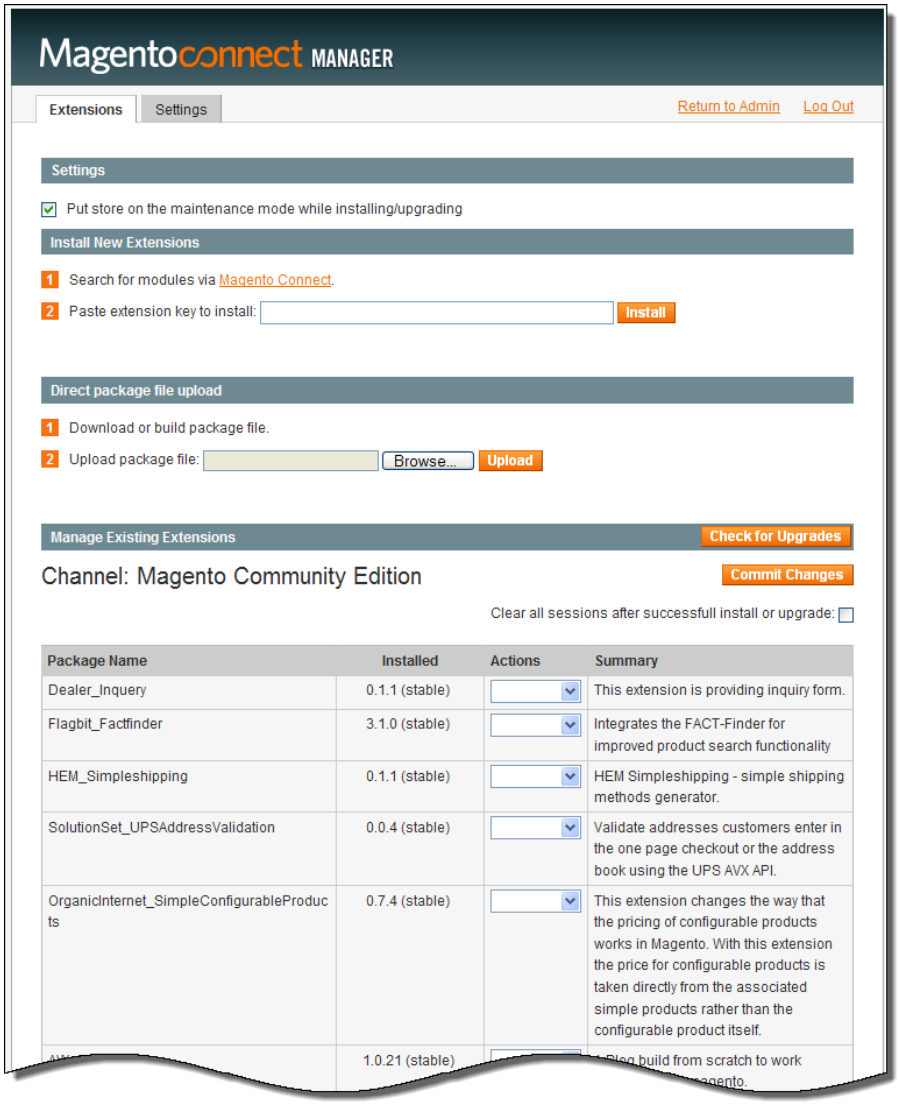

Magentoconnect MANAGER
Extensions
Settings
Return to Admin
Log Out
Settings
Put store on the maintenance mode while installing/upgrading
Install New Extensions
1 Search for modules via Magento Connect.
2 Paste extension key to install:
Install
Direct package file upload
1 Download or build package file.
2 Upload package file:
Browse...
Upload
Manage Existing Extensions
Check for Upgrades
Channel: Magento Community Edition
Commit Changes
Clear all sessions after successfull install or upgrade:
Package Name
Installed
Actions
Summary
Dealer_Inquery
0.1.1 (stable)
This extension is providing inquiry form.
Flagbit_Factfinder
3.1.0 (stable)
Integrates the FACT-Finder for improved product search functionality
HEM_Simpleshipping
0.1.1 (stable)
HEM Simpleshipping - simple shipping methods generator.
SolutionSet_UPSAddressValidation
0.0.4 (stable)
Validate addresses customers enter in the one page checkout or the address book using the UPS AVX API.
OrganicInternet_SimpleConfigurableProducts
0.7.4 (stable)
This extension changes the way that the pricing of configurable products works in Magento. With this extension the price for configurable products is taken directly from the associated simple products rather than the configurable product itself.
1.0.21 (stable)

Figure 247. Magento Connect Manager Page

3. Click the **Check for Upgrades** button. If there are upgrades available for any of the Magento CE modules, they are marked in yellow.
4. In the **Actions** column, select the upgrades to be installed and click the **Commit Changes** button.
5. Wait until the installation has finished and click the **Return to Admin** link in the header.
6. Congratulations! You have just upgraded your Magento CE. Now check your site to make sure everything works as expected.

# Extending Magento

There are hundreds of payment gateways and shipping providers all over the world. Magento CE out-of-the-box supports a few of the most popular ones. However, community members are developing and publishing new extensions in order to extend Magento CE with various new features. If you need to add functionality to Magento CE, you should first search for it on Magento Connect, which is our marketplace for extensions. You can access Magento Connect at: http://www.magentocommerce.com/magento-connect. The Magento Connect home page is displayed, as shown in Figure 248.

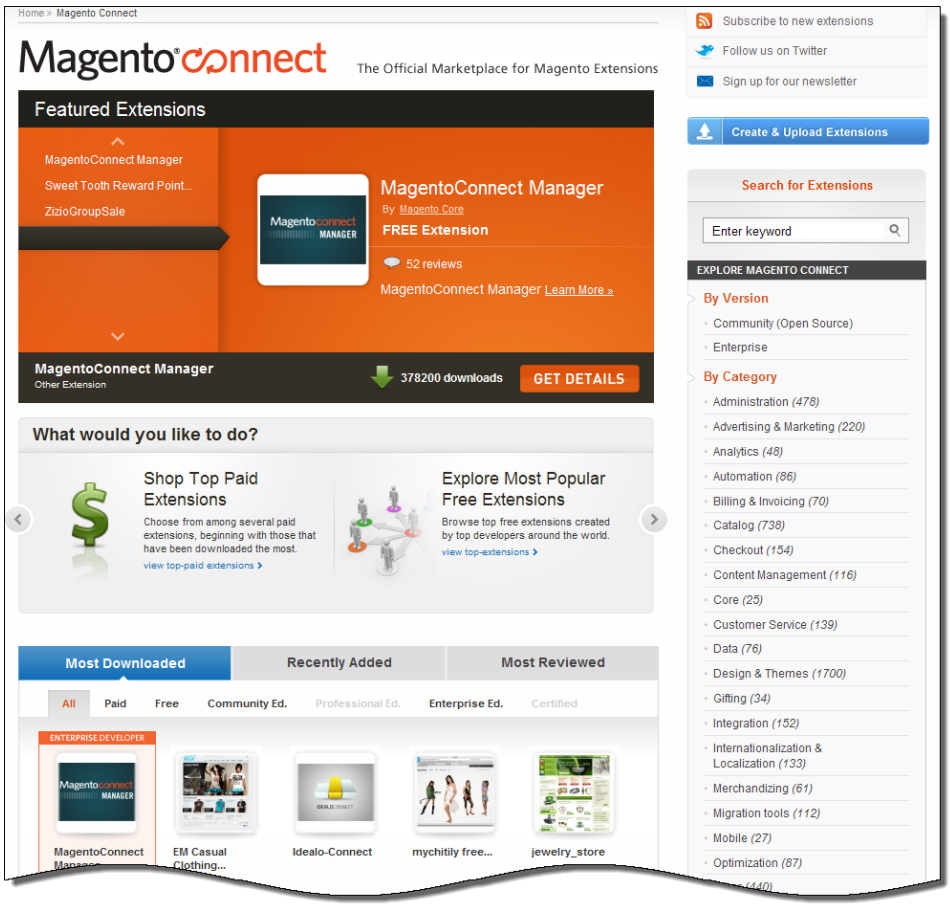



Figure 248. Magento Connect Home Page

Various free extensions are provided from this page.

The following example shows how to install the iDEAL core payment extension that adds a new payment method to the store called iDEAL.

**Note:** There are also commercial extensions available for purchase on their publishers' pages. The installation process for each one may vary. Please consult the extension author for installation instructions.

To install a free extension:

1. Go to the **MagentoConnect** page on the **MagentoCommerce** site at http://www.magentocommerce.com/.
2. Browse through the extensions using the filters provided in the panel on the right.
3. Go into the details page of the desired extension to display a page similar to Figure 249.

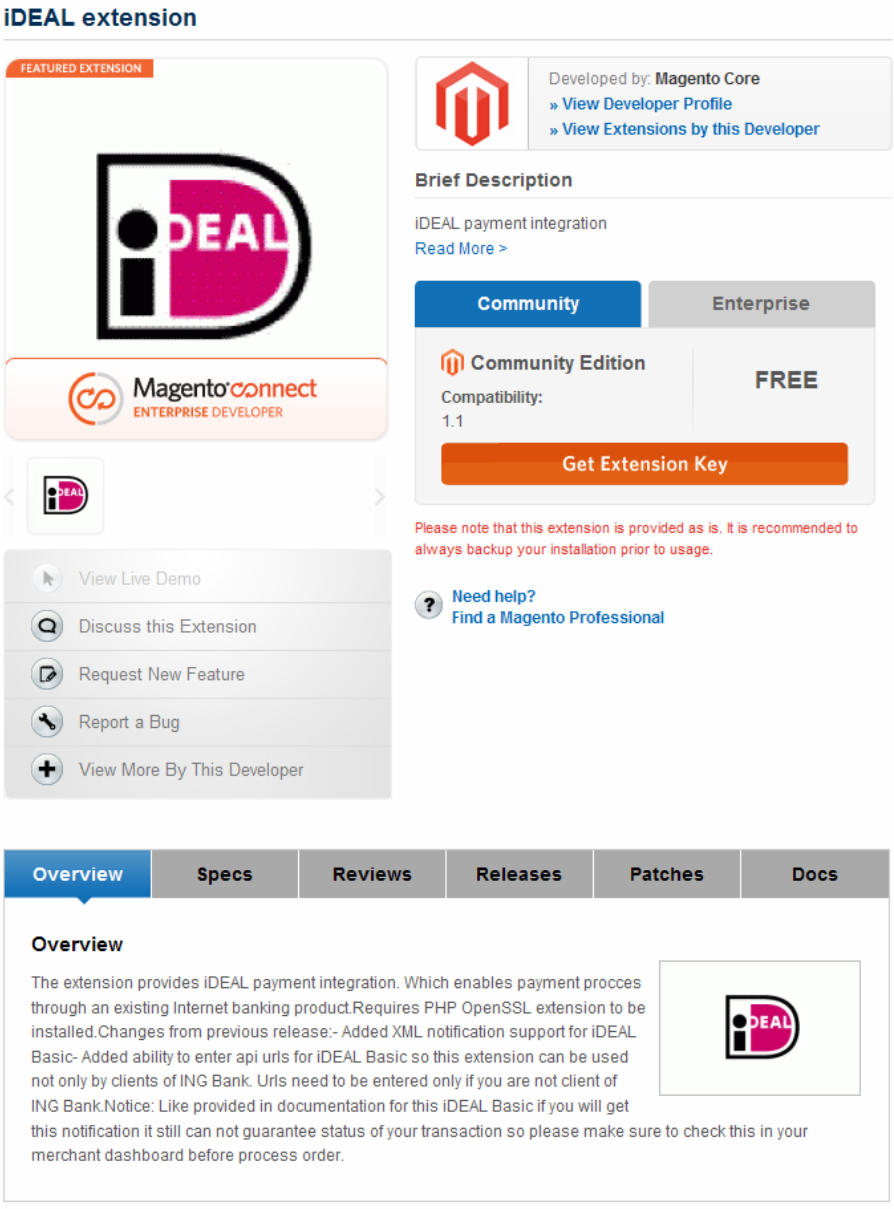

iDEAL extension
FEATURED EXTENSION
Magento connect
ENTERPRISE DEVELOPER
Developed by: Magento Core
» View Developer Profile
» View Extensions by this Developer
Brief Description
iDEAL payment integration
Read More >
Community
Enterprise
Community Edition
Compatibility:
1.1
FREE
Get Extension Key
Please note that this extension is provided as is. It is recommended to always backup your installation prior to usage.
Need help?
Find a Magento Professional
View Live Demo
Discuss this Extension
Request New Feature
Report a Bug
View More By This Developer
Overview
Specs
Reviews
Releases
Patches
Docs
Overview
The extension provides iDEAL payment integration. Which enables payment procces through an existing Internet banking product.Requires PHP OpenSSL extension to be installed.Changes from previous release:- Added XML notification support for iDEAL Basic- Added ability to enter api urls for iDEAL Basic so this extension can be used not only by clients of ING Bank. Urls need to be entered only if you are not client of ING Bank.Notice: Like provided in documentation for this iDEAL Basic if you will get this notification it still can not guarantee status of your transaction so please make sure to check this in your merchant dashboard before process order.

Figure 249. Extension Details Page

4. Click **Get Extension Key** to display the following:

Magento Connect Version: 1.0 What is this?
GET EXTENSION KEY
By checking this box I agree to the extension license agreement.

5. Click the link to read the license agreement, then accept the licensing agreement by selecting the agreement check box.
6. An extension key similar to the following is displayed: **magento-core/Mage_Ideal.** This is a special link to an extension that Magento recognizes. Click **Select** to select it and then copy it to the clipboard (**Ctrl+C**).
7. In the Admin Panel, select **System > Magento Connect > Magento Connect Manager**.
8. Log in using your backend username and password and click **Log In**.
9. Paste the extension key in the **Install New Extensions** section, as shown in Figure 250.

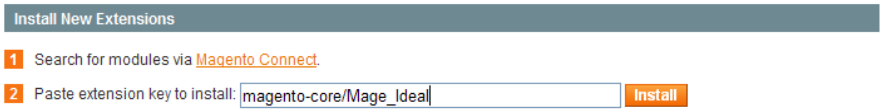

Install New Extensions
1 Search for modules via Magento Connect.
2 Paste extension key to install: magento-core/Mage_Ideal
Install

Figure 250. Pasting the Extension Key

10. Click the **Install** button and wait until the installation has finished.

You can now return to the backend and start using the extension that you have just installed!

**Note:** After you install a payment module, this new option appears in the **System** menu under **Configuration > SALES > Payment Methods**.

# CAPTCHA

CAPTCHA functionality is used to ensure that a human being is interacting with the site, rather than another computer. It can be used in the backend and frontend. CAPTCHA in Magento is visual and is fully configurable.

The CAPTCHA was implemented using a module from Zend Framework.

## CAPTCHA: Quick Reference

The following table lists the main tasks related to the CAPTCHA functionality, and the places where they are performed in the Magento Admin Panel.

| Task | Admin Panel Menu | Scope |
|---|---|---|
| Enable and configure the CAPTCHA for the backend | **System** > **Configuration** > ADVANCED >**Admin** > **CAPTCHA** | Global |
| Enable and configure the CAPTCHA for the frontend | **System** > **Configuration** > CUSTOMERS >**Customer Configuration** > **CAPTCHA** | Website |

# Enabling and Configuring CAPTCHA for the Backend

## To enable and configure CAPTCHA for the backend:

1. Log in to the Magento Admin Panel.
2. Navigate to **System** > **Configuration** > ADVANCED >**Admin** > **CAPTCHA.** Make sure that the **Current Configuration Scope** is set to **Default.**
3. Configure the following settings:
   - **Enable CAPTCHA in Admin:** Enables CAPTCHA for the login pages of the Admin Panel.
   - **Font:** Defines the font used for CAPTCHA displaying. To add your own font, put the font file in the same directory as your Magento instance and specify it in the `config.xml` file that is stored in the `app/code/core/Mage/Captcha/etc/` folder.
   - **Forms:** Defines the form, on which CAPTCHA is displayed. Available options: **Admin Login** and **Admin Forgot Password**.
   - **Displaying Mode:** Defines preconditions for displaying CAPTCHA. Available options: **Always** or **After number of attempts to login**. If the latter is selected, the **Number of Unsuccessful Attempts to Login** text field is displayed. Setting **Number of Unsuccessful Attempts to Login** to 0 (zero) is similar to setting **Displaying Mode** to **Always.** The **After number of attempts to login** option does not cover the Forgot Password form. If the CAPTCHA functionality is enabled and set to be displayed on this form, then it is always displayed on the form.

   **Note**: To track the number of unsuccessful login attempts, the attempts to log in under one email address from one IP address are counted. The maximum allowed number of attempts to log in from one IP address is 1,000. This limitation is applied only when the CAPTCHA functionality is enabled.

   - **CAPTCHA Timeout (minutes):** Defines how long the displayed CAPTCHA is valid. After the timeout the user needs to reload the page.
   - **Number of Symbols:** Defines the number of symbols that are used for creating CAPTCHA. Maximum allowed value is 8. You can also specify a range, for example, `5-8;` each generated CAPTCHA can contain different number of symbols.
   - **Symbols Used in CAPTCHA:** Defines what symbols are used in CAPTCHA. Only letters (a-z and A-Z) and numbers (0-9) are allowed. The default set of symbols suggested in the field excludes similar looking symbols like “i”, “l”, “1”. Displaying these symbols in CAPTCHA decreases the chances that a user will recognize CAPTCHA correctly.
   - **Case Sensitive:** Defines whether letters in CAPTCHA are case sensitive.
4. To save the settings click **Save Config**.

# Enabling and Configuring CAPTCHA for the Frontend

## To enable and configure CAPTCHA displaying in the frontend:

1. Log in to the Magento Admin Panel.
2. Navigate to **System** > **Configuration** > CUSTOMERS > **Customer Configuration**.
3. In the **Current Configuration Scope** drop-down field select the desired website.
4. Expand the **CAPTCHA** field set. Configure the following settings:
   - **Enable CAPTCHA on Frontend:** Enables the CAPTCHA for the website frontend;
   - **Font:** Defines the font used for CAPTCHA displaying. To add your own font, put the font file in the same directory as your Magento instance and specify it in the *config.xml* stored in the *app/code/core/Mage/Captcha/etc/* folder.
   - **Forms:** Defines the forms where CAPTCHA is used. The following options are available: **Create User, Login**, **Forgot Password**, **Checkout as Guest**, and **Register during Checkout**.
   - **Displaying Mode:** Defines preconditions for displaying CAPTCHA. Available options: **Always** or **After number of attempts to login**. If the latter is selected, the **Number of Unsuccessful Attempts to Login** text field is displayed. Setting **Number of Unsuccessful Attempts to Login** to 0 (zero) is similar to setting **Displaying Mode** to **Always.** The **After number of attempts to login** option does not cover the Forgot Password and Create User forms. If the CAPTCHA functionality is enabled and these forms are selected in the **Forms** field, the CAPTCHA is always displayed on these forms.

   **Note:** To track the number of unsuccessful attempts to log in, the attempts to log in under one email address from one IP-address are counted. The maximum allowed number of attempts to log in from one IP-address is 1,000. This limitation is only applied when the CAPTCHA functionality is enabled.

   - **CAPTCHA Timeout (minutes):** Defines for how long the displayed CAPTCHA is valid. After the timeout a user needs to reload the page.
   - **Number of Symbols:** Defines the number of symbols that are used for creating CAPTCHA. Maximum allowed value is 8. You can also specify a range, for example, `5-8`.
   - **Symbols Used in CAPTCHA:** Defines what symbols are used in CAPTCHA. Only letters (a-z and A-Z) and numbers (0-9) are allowed. The default set of symbols suggested in the field excludes similar looking symbols like “i”, “l”, “1”. Displaying these symbols in CAPTCHA decreases the chances that a user will recognize CAPTCHA correctly.
   - **Case Sensitive:** Defines whether letters in CAPTCHA are case sensitive.
5. To save the settings click **Save Config**.

## CAPTCHA: User Experience

The CAPTCHA in Magento is visual. The following pictures illustrate the way CAPTCHA is displayed in the frontend and the backend.

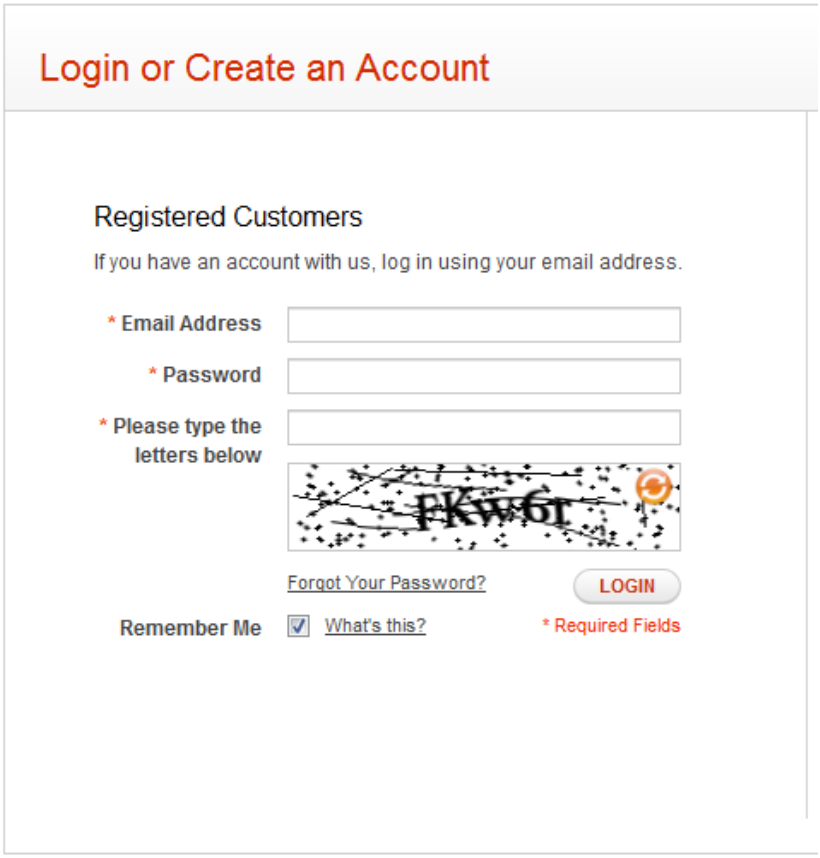



Figure 251. CAPTCHA in the frontend

Users can reload the displayed CAPTCHA by clicking the **Reload** icon in the upper right corner of the image. The number of reloads is not limited.

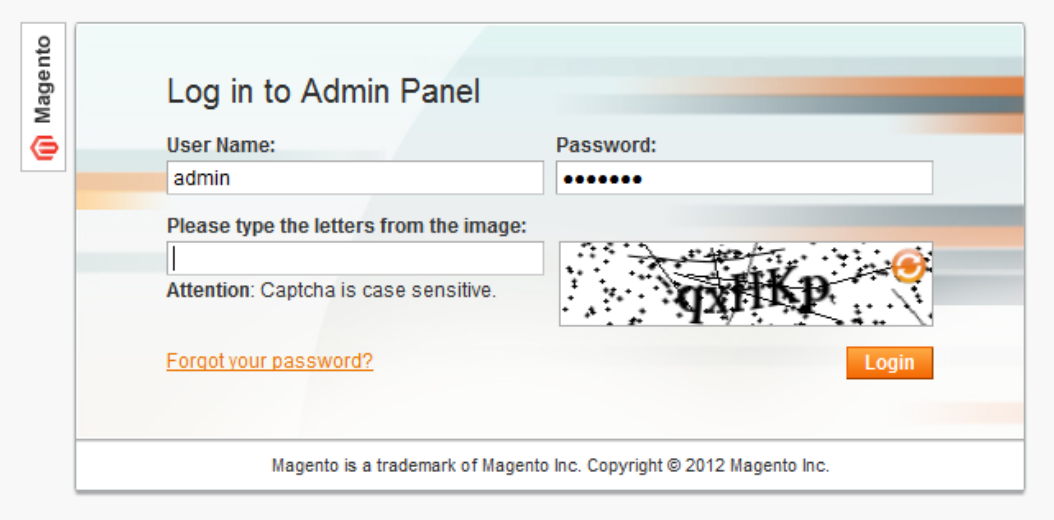



Figure 252. CAPTCHA in the backend

Admin users can reload the displayed CAPTCHA by clicking the **Reload** icon in the upper right corner of the image. The number of reloads is not limited.

# 17 Indexing

*Indexing* is how Magento transforms data such as products, categories, and so on, to improve the performance of your web store. As data changes, the transformed data must be updated—or *reindexed*. Magento has very sophisticated architecture that stores merchant data (including catalog data, prices, users, stores, and so on) in many database tables. To optimize storefront performance, Magento accumulates data into special tables using indexers.

For example, suppose you change the price of an item from $4.99 to $3.99. Magento must reindex the price change to display it on your web store.

Without indexing, Magento would have to calculate the price of every product on the fly—taking into account shopping cart price rules, bundle pricing, discounts, tier pricing, and so on. Loading the price for a product would take a long time, possibly resulting in cart abandonment.

## Index Management Page

The Index Management page enables you to perform actions on the various indexes that Magento maintains. To access the Index Management page, click **System > Index Management**.

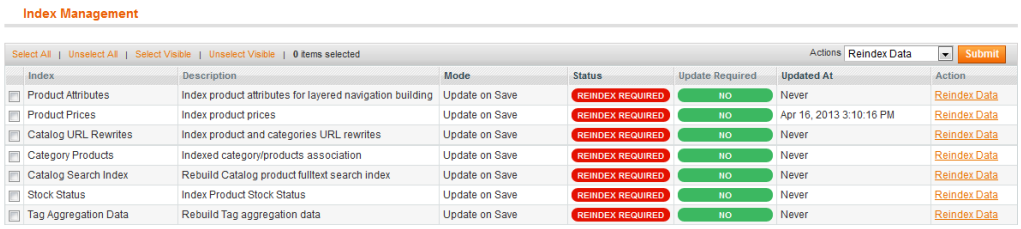

Index Management
Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected
Actions Reindex Data Submit
Index | Description | Mode | Status | Update Required | Updated At | Action
Product Attributes | Index product attributes for layered navigation building | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Product Prices | Index product prices | Update on Save | REINDEX REQUIRED | NO | Apr 16, 2013 3:10:16 PM | Reindex Data
Catalog URL Rewrites | Index product and categories URL rewrites | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Category Products | Indexed category/products association | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Catalog Search Index | Rebuild Catalog product fulltext search index | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Stock Status | Index Product Stock Status | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Tag Aggregation Data | Rebuild Tag aggregation data | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data

**Figure 253. Index Management Page**

The page is presented differently If you enabled flat catalog product options. For more information, see “Using Flat Catalog and Product Reindexing,” page 267.

The following figure shows an example of the Index Management page with the flat catalog product options enabled.

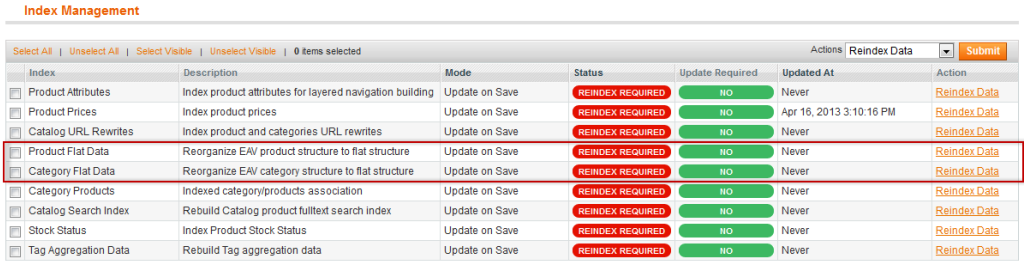

Index Management
Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected
Actions Reindex Data Submit
Index | Description | Mode | Status | Update Required | Updated At | Action
Product Attributes | Index product attributes for layered navigation building | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Product Prices | Index product prices | Update on Save | REINDEX REQUIRED | NO | Apr 16, 2013 3:10:16 PM | Reindex Data
Catalog URL Rewrites | Index product and categories URL rewrites | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Product Flat Data | Reorganize EAV product structure to flat structure | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Category Flat Data | Reorganize EAV category structure to flat structure | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Category Products | Indexed category/products association | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Catalog Search Index | Rebuild Catalog product fulltext search index | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Stock Status | Index Product Stock Status | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Tag Aggregation Data | Rebuild Tag aggregation data | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data

**Figure 254. Index Management Page with Flat Data Indexing Enabled**

## Understanding the Columns on the Index Management Page

The following table describes the columns on the Index Management page:

| Column Name | Description |
|---|---|
| Index | Name of the indexer |
| Description | Description of the indexer |
| Mode | In the preceding figures, most of the indicated indexers are set to **Update on Save**, which means a reindex is required when a change is saved in the Admin Panel. To change this option, see "How to Reindex Manually," below. |
| Status | Displays one of the following:<br>• **Reindex Required** if a change has been made that requires reindexing. If a check box and Reindex Required link appears in that row, you can manually reindex as discussed in"How to Reindex Manually," below.<br>• **Ready** if the index is up-to-date. |
| Update Required | Indicates whether or not you must manually reindex. (The value in the Mode column indicates whether the indexer must be manually updated.) |
| Updated At | Displays the date and time an index was last manually updated, or Never if the index has never been manually updated. |
| Action | Displays a **Reindex Data** link. Click the link to reindex that option only. |

## How to Reindex Manually

For the indexers that require manual updates, you have the following options on this page.

The indexers that require manual updates display with a check box next to their name (Product Attributes, Tag Aggregation Data, and, optionally, Catalog Search Index).

| Task | Steps |
|---|---|
| Manually reindex | To manually update one or more indexers:<br>• To update more than one indexer at a time, select the check box next to its name. From the Action list, click **Reindex Data** and click **Submit**.<br>• To update one index only, click the **Reindex Data** link in the Action column on the right. |
| Change the indexing mode | By default, indexers that require manual updating are set to **Update on Save** which means reindexing occurs after a change is made in the Admin Panel.<br>The other option is to manually reindex every time a change is made. (For example, if you change product attributes in the Admin Panel, you must |

| Task | Steps |
| --- | --- |
| | manually update the Product Attributes index.)<br><br>To change the indexing mode:<br>1. Select the check box next to one or more indexers to change.<br>2. From the Actions list, click **Change Index Mode**. This displays the Index Mode list.<br>3. From the Index Mode list, click the desired option.<br>4. Click **Submit**. The value in the Mode column updates to indicate your choice. |

# Using URL Rewrites

URL rewriting (sometimes referred to as request rewriting) enables you to access resources such as product pages, categories, and so on, by additional uniform resource identifiers (URIs).

For example, suppose your web store has a product named Microsoft Natural Ergonomic Keyboard 4000 assigned to the Computer Peripherals category. By default, the product can be accessed using a URL like `http://www.example.com/peripherals/microsoft-natural-ergonomic-keyboard-4000.html`. URL redirect enables you to create an additional URL like `http://www.example.com/great-keyboard.html`.

Using URL rewriting, you can choose a combination of:

- Custom, category, or product URL rewrite type
- Request path, which can be any valid URI (for example, for a seasonal promotion, you might want a product URL to end with **`best-valentines-gift.html`**)
- Target path, which specifies the actual path to the product or category (for example, for a promotion, you might want a category named **`spring-sale`**)

**Note**: The custom and target path options enable you to redirect to a custom path, such as a Content Management System (CMS) path. The target path must be valid; otherwise, the redirect results in a 404 (Not Found) error on your web store.

- Redirect type (determines how search engines rank the redirect)
  - None (useful if you don't want the customer to have to wait the additional time required to redirect)
  - Temporary (HTTP 302 (Found))
  - Permanent (HTTP 301 (Moved Permanently))

**Note**: Magento recommends choosing a permanent redirect because search engines generally preserve the page's ranking. A 302 (Temporary) redirect does not preserve a page's ranking. For more information, consult a resource such as seomoz.org or google.com.

## Sample URL Rewrites

Magento CE enables you to create redirects to add additional URLs for items. You can do this, for example, to make items more attractive to buyers. You can create a redirect to any valid path, including paths you create in your CMS.

For example, you can change the following product URL:

```
http://www.example.com/peripherals/microsoft-natural-ergonomic-keyboard-4000.html
```

and add another one such as:

```
http://www.example.com/best-keyboard.html
```

or you can create another URL for a category like:

```
http://www.example.com/all-on-sale.html
```

To create a category path like the following for a promotion, you must first create a path using the CMS or by other means.

```
http://www.example.com/save-now/spring-sale
```

## URL Rewrite Option: Setting Category and Product URL Suffixes

By default, Magento enables web store customers to access products and categories with a URL that ends with .html. You can optionally change both the product and category URL suffix to any alphanumeric string.

The examples throughout this section use the default suffix, `.html`.

### To optionally change the product and category URLs:

1. Log in to the Admin Panel as an administrator.
2. Click **System > Configuration**.
3. In the CATALOG group, click **Catalog**.
4. In the right pane, expand **Search Engine Optimizations**.
5. Enter valid values in the **Product URL Suffix** and **Category URL Suffix** fields.
6. Valid values are alphanumeric characters (a-z, A-Z, 0-9) or the underscore character (_).
7. Click **Save Config** at the top of the page.

# Getting Started with URL Rewrites

## To get started:

1. Log in to the Admin Panel as an administrator.
2. Click **Catalog > URL Redirects**. The following figure shows a sample URL Redirect Management page.

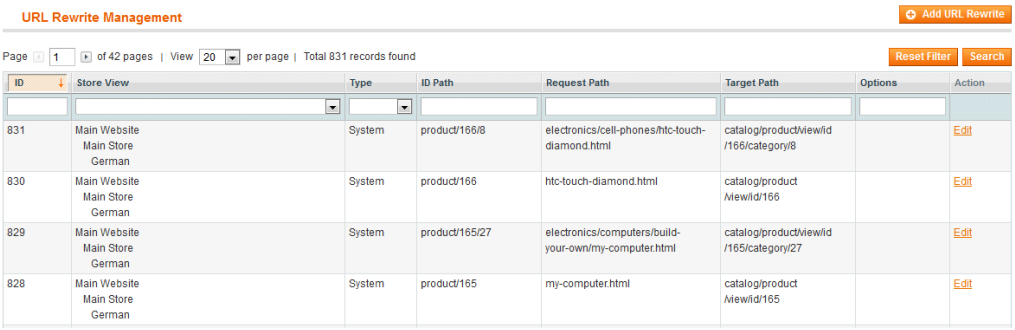

URL Rewrite Management
Add URL Rewrite
Page 1 of 42 pages | View 20 per page | Total 831 records found
Reset Filter
Search
ID
Store View
Type
ID Path
Request Path
Target Path
Options
Action
831 Main Website Main Store German System product/166/8 electronics/cell-phones/htc-touch-diamond.html catalog/product/view/id/166/category/8 Edit
830 Main Website Main Store German System product/166 htc-touch-diamond.html catalog/product/view/id/166 Edit
829 Main Website Main Store German System product/165/27 electronics/computers/build-your-own/my-computer.html catalog/product/view/id/165/category/27 Edit
828 Main Website Main Store German System product/165 my-computer.html catalog/product/view/id/165 Edit

**Figure 255. URL Redirect Management Page**

The preceding figure shows the following sample URL rewrites that are created for the Magento sample data.

The following table discusses the meanings of the columns on this page.

| Column | Description |
|---|---|
| ID | A unique identifier Magento assigns to the URL rewrite. |
| Store View | Name of the store with which the URL rewrite is associated. |
| Type | Typically displays either System (system, or Magento default, URL rewrites) or Custom) URL rewrites you configure. |
| ID Path | The system, or actual, URI of the product or category. |
| Request Path | The unique part of the URI for that redirect. The request path can be any URL-encoded string. For example, `great-valentines-gift.html`. |
| Target Path | The URI that identifies the product, category, CMS page, and so on. The target path you enter must be valid; otherwise, the redirect fails with a 404 (Not Found). |
| Options | Displays one of the following:<br>• **R** if you chose a temporary (HTTP 302) redirect.<br>• **RP** if you chose a permanent (HTTP 301) redirect.<br>• Nothing if you chose to not redirect. |
| Action | Click **Edit** in this column to edit or delete the redirect. (You can also click the row itself.) |

# Creating New URL Rewrites

This section discusses how to create new custom, product, or category URL redirects.

1. Complete the tasks discussed in "Getting Started with URL Rewrites," page 263.
2. Click **Add URL Rewrite**.
3. From the **Create URL Rewrite** list, click one of the following:

| Option | Description |
|---|---|
| For Category | Redirect to a category page. Magento system category paths use the format `catalog/category/view/id/category-string`<br>You can optionally redirect to a custom CMS path if you have already set one up. |
| For Product | Redirect to a product page. Magento system product paths use the format `catalog/product/view/id/string or catalog/product/view/id/product-string/category/category-string`<br>You can optionally redirect to a custom CMS path if you have already set one up. |
| Custom | Redirect to any valid path. To use this option, you must know the exact request and target path. |

The bottom section of the page refreshes to reflect the choices available for the type of URL rewrite you selected.

4. Do any of the following:
    - Custom redirect: Enter the required information. For more information, see step 6.
    - Category redirect: Click the name of the category.
    - Product redirect: Click the name of the product.
5. For product redirect only: Optionally click the name of a category, or click **Skip choosing category** to let the product remain associated with its original category. You need to click a category name only if you want the URL redirect to go to a different category.
6. Enter the following information:

| Option | Description |
|---|---|
| Type | Usually displays **Custom**. |
| Store | From the list, click the name of the store to which the URL rewrite applies. |
| Request Path | Enter a unique path to identify the product or category. The path can be in any format that uses URL percent encoding. Examples:<br>• `best-valentines-gift.html`<br>• `greatest-keyboard.html`<br>• `products-on-sale.html`<br>• `best/products/on/sale/now.html` |

| Option | Description |
|---|---|
| Target Path | Enter a request path in one of the following formats:<br>• Custom redirect: Any valid path.<br>• Category redirect:<br>  ○ System path: Unless you set up a custom path using the CMS, you should leave this field unchanged. By default, system category paths have a format like: `catalog/category/view/id/category-string`<br>  ○ Custom path: Any valid path<br>• Product redirect:<br>  ○ System path: Unless you set up a custom path using the CMS, you should leave this field unchanged. By default, system category paths have a format like: `catalog/product/view/id/string` or `catalog/product/view/id/product-string/category/category-string`<br>  ○ Custom path: Any valid path |
| Redirect type | From the list, click:<br>• **No**<br>• **Temporary (302)**<br>• **Permanent (301).** Magento recommends choosing this option because search engines retain the page ranking. |
| Description | Enter an optional description. |

7. At the top right corner of the page, click **Save**.

The following figure shows a sample product permanent redirect that adds the URL `http://www.example.com/greatest-keyboard.html` to the English web site for a product whose ID is 159.

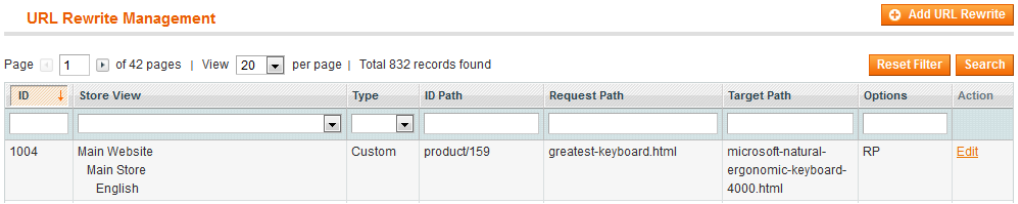



Figure 256. URL Redirect Information

## Verifying URL Rewrites

This section discusses how to verify that a sample product URL rewrite is displayed correctly on your Magento web store.

1. In the Admin Panel, click **System > Index Management**.
2. Click **Select All** at the top of the left column.

3. From the **Actions** list, click **Reindex Data**.
4. Click **Submit**. The following figure shows an example.

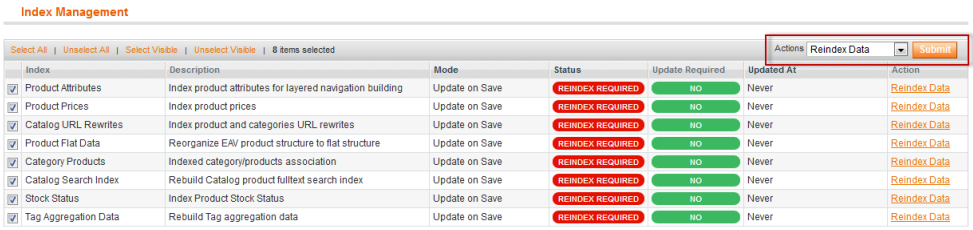
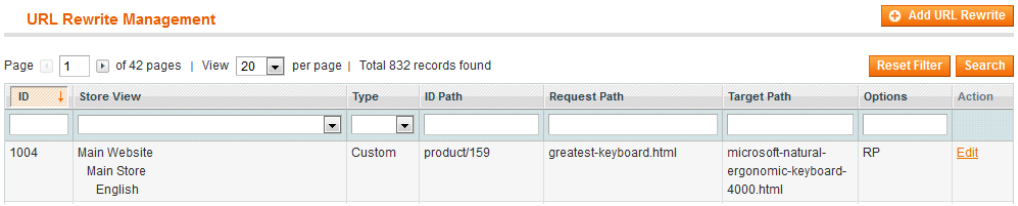

Index Management
Select All | Unselect All | Select Visible | Unselect Visible | 8 items selected
Actions Reindex Data Submit
Index | Description | Mode | Status | Update Required | Updated At | Action
Product Attributes | Index product attributes for layered navigation building | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Product Prices | Index product prices | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Catalog URL Rewrites | Index product and categories URL rewrites | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Product Flat Data | Reorganize EAV product structure to flat structure | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Category Products | Indexed category/products association | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Catalog Search Index | Rebuild Catalog product fulltext search index | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Stock Status | Index Product Stock Status | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data
Tag Aggregation Data | Rebuild Tag aggregation data | Update on Save | REINDEX REQUIRED | NO | Never | Reindex Data

**Figure 257. Verifying Product URL Redirect**

5. Click **Catalog > URL Rewrite Management**. To open the URL Rewrite Management page.
6. Click a row corresponding to a product redirect. The following figure shows the example used in this section.


URL Rewrite Management
Add URL Rewrite
Page 1 of 42 pages | View 20 per page | Total 832 records found
Reset Filter Search
ID | Store View | Type | ID Path | Request Path | Target Path | Options | Action
1004 | Main Website Main Store English | Custom | product/159 | greatest-keyboard.html | microsoft-natural-ergonomic-keyboard-4000.html | RP | Edit

7. Open a new browser window or tab page.
8. In the browser's location or address field, construct the URL to the product as follows:
    - Start with the scheme (`http://` or `https://`, then your web store's domain name, followed by /.
    - Append to it the value of the **Target Path** field from the Admin Panel, followed by /.
    - Append to it the value of the **Request Path** field.

    For a Magento web store whose domain is `http://www.example.com`, the URL should look like the following:

    `http://www.example.com/sale-keyboard.html`
9. Press ENTER. The following figure shows an example of a successful redirect.

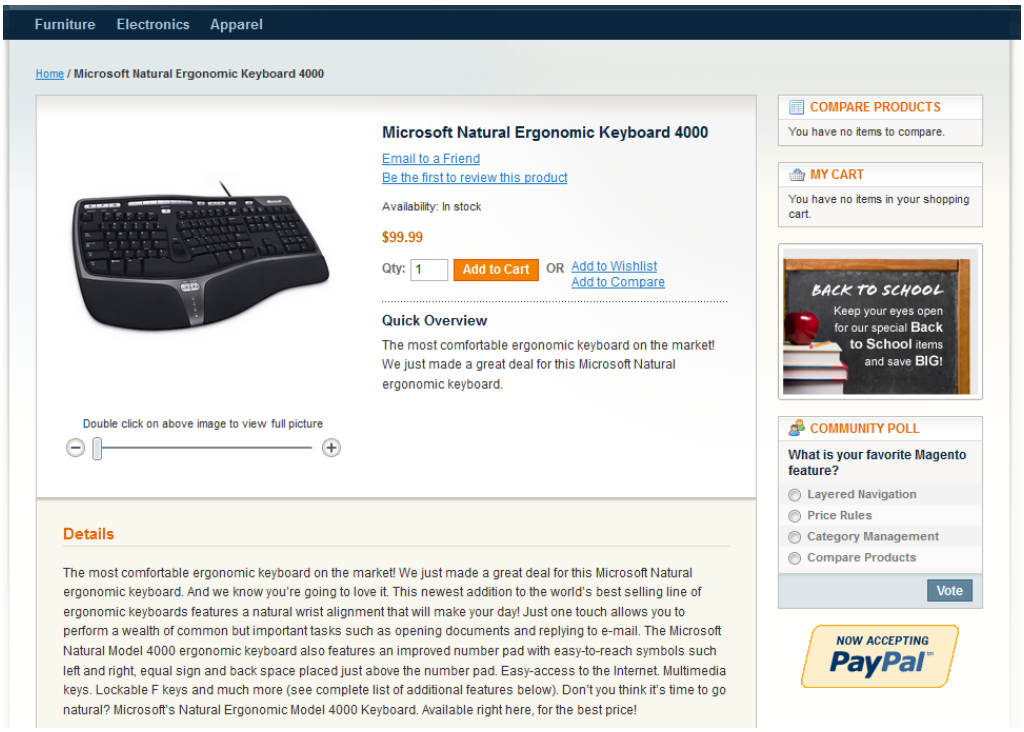

Furniture
Electronics
Apparel
Home / Microsoft Natural Ergonomic Keyboard 4000
Microsoft Natural Ergonomic Keyboard 4000
Email to a Friend
Be the first to review this product
Availability: In stock
$99.99
Qty: 1
Add to Cart
OR
Add to Wishlist
Add to Compare
Quick Overview
The most comfortable ergonomic keyboard on the market! We just made a great deal for this Microsoft Natural ergonomic keyboard.
Double click on above image to view full picture
Details
The most comfortable ergonomic keyboard on the market! We just made a great deal for this Microsoft Natural ergonomic keyboard. And we know you're going to love it. This newest addition to the world's best selling line of ergonomic keyboards features a natural wrist alignment that will make your day! Just one touch allows you to perform a wealth of common but important tasks such as opening documents and replying to e-mail. The Microsoft Natural Model 4000 ergonomic keyboard also features an improved number pad with easy-to-reach symbols such left and right, equal sign and back space placed just above the number pad. Easy-access to the Internet. Multimedia keys. Lockable F keys and much more (see complete list of additional features below). Don't you think it's time to go natural? Microsoft's Natural Ergonomic Model 4000 Keyboard. Available right here, for the best price!
COMPARE PRODUCTS
You have no items to compare.
MY CART
You have no items in your shopping cart.
BACK TO SCHOOL
Keep your eyes open for our special Back to School items and save BIG!
COMMUNITY POLL
What is your favorite Magento feature?
Layered Navigation
Price Rules
Category Management
Compare Products
Vote
NOW ACCEPTING
PayPal

Figure 258. Successful Redirect

**Note**: If a 404 (Not Found) error appears, verify the target path precedes the request path and that each path is separated by one / character.

10. Optionally verify category and custom redirects the same way.

## Editing or Deleting URL Rewrites

### To edit or delete a URL rewrite:

1. Log in to the Admin Panel as an administrator.
2. Click **Catalog > URL Rewrites**. The URL Rewrite Management page opens.
3. Click the row of the URL redirect to edit or delete. To edit a URL redirect, you can also click **Edit** in the Action column.
4. To delete the URL redirect, click **Delete**. You are required to confirm the action. To edit a redirect, edit or change the information displayed on your screen. For additional information, see “Creating New URL Rewrites,” page 264.

# Using Flat Catalog and Product Reindexing

Magento uses the Entity-Attribute-Value (EAV) model for storing customer, product, and category data in its database. Although the EAV model enables you to have completely extensible attributes for those objects, object attributes are stored in multiple tables rather than one very large table.

Because attributes are stored in many tables—and that includes copies of some of the same attributes—SQL queries are long and complex. The flat catalog feature creates new tables on the fly, where each row contains all necessary data about a product or category.

## Flat Catalog Prerequisite: Enabling Frontend Options

### To enable flat catalog and product indexing:

1. Log in to the Admin Panel as an administrator.
2. Click **System > Configuration**.
3. In the CATALOG group, click **Catalog**.
4. In the right pane, click **Frontend**.
5. From the **Use Flat Catalog Category** list, click **Yes**.
6. From the **Use Flat Catalog Product** list, click **Yes**. The following figure shows an example.

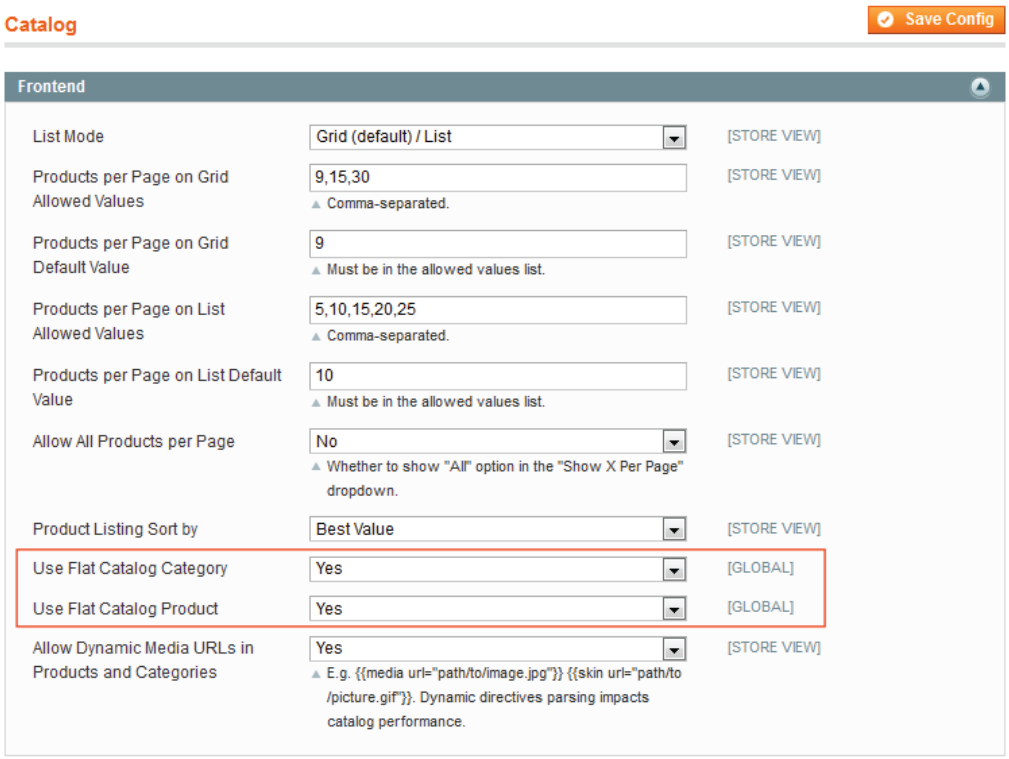



**Figure 259. Flat Index Frontend Options**

7. In the upper right corner, click **Save Config**.

# Verifying the Results of the Flat Catalog Configuration

This section discusses examples of both changes to individual products and changes to multiple products and categories at the same time.

**Note**: Magento recommends performing the tasks discussed in this section in a development environment first.

## Verifying Flat Catalog Changes for a Single Product

### To verify flat catalog changes for one product:

1. Log in to the Admin Panel as an administrator.
2. In a different browser tab page or window, open your web store's front page.
3. In the Admin Panel, click **Catalog > Manage Products**.
4. Choose a product to modify.This example uses the Nokia 2610 Phone.
5. Click the name of the product to edit it.
6. Click the **General** tab.
7. Append `_DEMO` to the value in the **Name** field. The following figure shows an example.

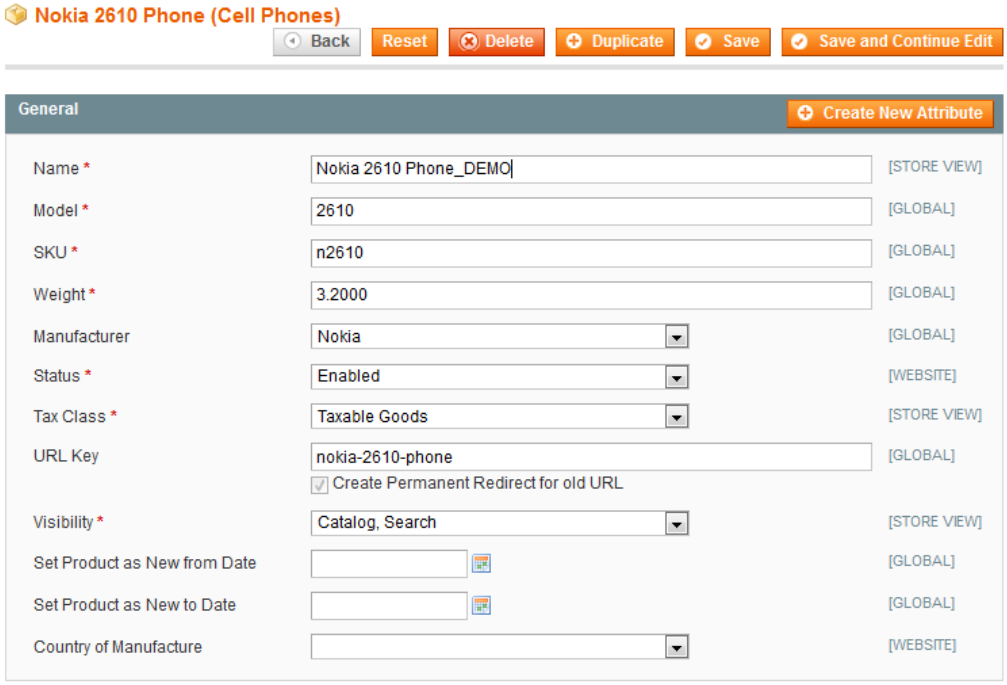



**Figure 260. Changing an Attribute Value**

8. Click **Save**.
9. View your web store.

10. Search for the product you edited or browse to the category that contains it.
11. If necessary, refresh the page to see the result of the change you made. The following figure shows an example.

Nokia 2610 Phone_DEMO
Email to a Friend
3 Review(s) | Add Your Review
Availability: In stock
$149.99
Qty: 1
Add to Cart
OR
Add to Wishlist
Add to Compare
Quick Overview
The words "entry level" no longer mean "low-end," especially when it comes to the Nokia 2610. Offering advanced media and calling features without breaking the bank
Double click on above image to view full picture
MORE VIEWS

Figure 261. Product Page Showing Updated Attribute

## Verifying Flat Catalog Changes for Multiple Products

### To verify flat catalog changes for multiple products:

1. Log in to the Admin Panel as an administrator.
2. In a different browser tab page or window, open your web store's front page.
3. In the Admin Panel, click **Catalog > Manage Categories**.
4. From the Choose Store View list, click the name of a store to view categories for that store. (You can also click **All Store Views**).
5. In the left pane, click the name of an existing category.
6. Click **Add Subcategory**.
7. In the **Name** field, specify `Demo category`.
8. From the **Is active** list, click **Yes**.
9. Click **Save Category**.
10. Click the **Category Products** tab.
11. Click **Reset Filter** to display your products.

12. Select the check box of several products to add them to the new category. The following figure shows an example.

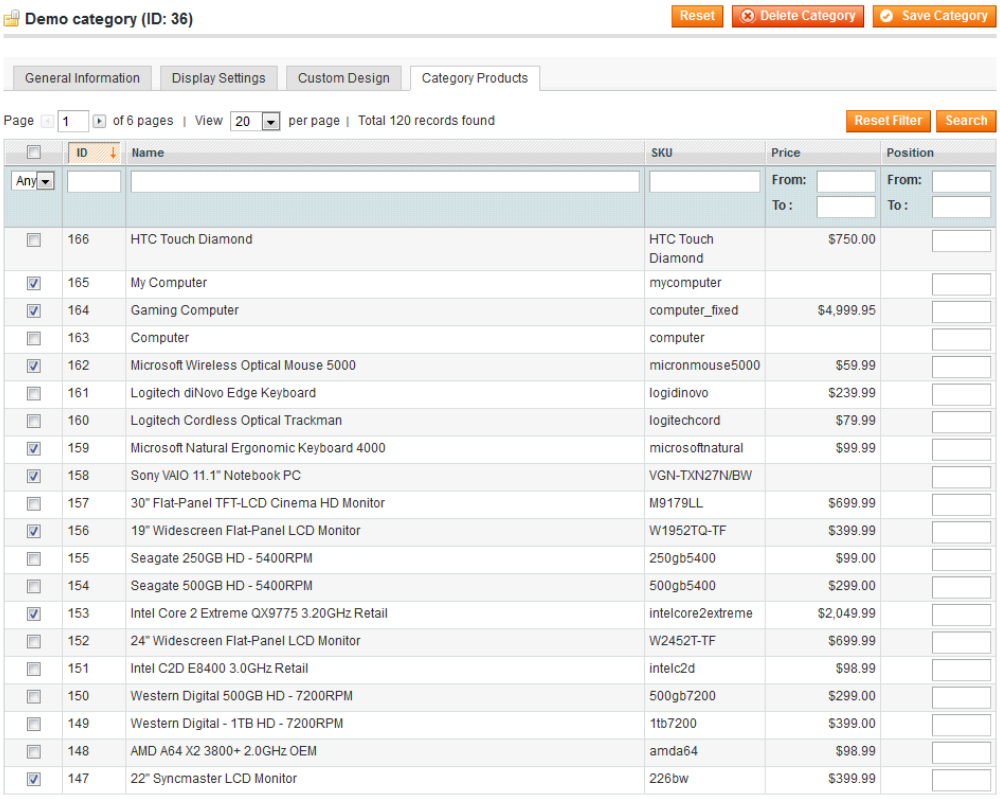

Demo category (ID: 36)
Reset
Delete Category
Save Category
General Information
Display Settings
Custom Design
Category Products
Page 1 of 6 pages | View 20 per page | Total 120 records found
Reset Filter
Search
ID
Name
SKU
Price
Position
Any
From:
To:
From:
To:
166 HTC Touch Diamond HTC Touch Diamond $750.00
165 My Computer mycomputer
164 Gaming Computer computer_fixed $4,999.95
163 Computer computer
162 Microsoft Wireless Optical Mouse 5000 micronmouse5000 $59.99
161 Logitech diNovo Edge Keyboard logidinovo $239.99
160 Logitech Cordless Optical Trackman logitechcord $79.99
159 Microsoft Natural Ergonomic Keyboard 4000 microsoftnatural $99.99
158 Sony VAIO 11.1" Notebook PC VGN-TXN27N/BW
157 30" Flat-Panel TFT-LCD Cinema HD Monitor M9179LL $699.99
156 19" Widescreen Flat-Panel LCD Monitor W1952TQ-TF $399.99
155 Seagate 250GB HD - 5400RPM 250gb5400 $99.00
154 Seagate 500GB HD - 5400RPM 500gb5400 $299.00
153 Intel Core 2 Extreme QX9775 3.20GHz Retail intelcore2extreme $2,049.99
152 24" Widescreen Flat-Panel LCD Monitor W2452T-TF $699.99
151 Intel C2D E8400 3.0GHz Retail intelc2d $98.99
150 Western Digital 500GB HD - 7200RPM 500gb7200 $299.00
149 Western Digital - 1TB HD - 7200RPM 1tb7200 $399.00
148 AMD A64 X2 3800+ 2.0GHz OEM amda64 $98.99
147 22" Syncmaster LCD Monitor 226bw $399.99

Figure 262. Demo Category

13. Click **Save Category**.

14. View your web store.

15. Search for or browse to the category you created.

16. If necessary, refresh the page to see the changes you made. The following figure shows an example of adding several products to a subcategory of Electronics.

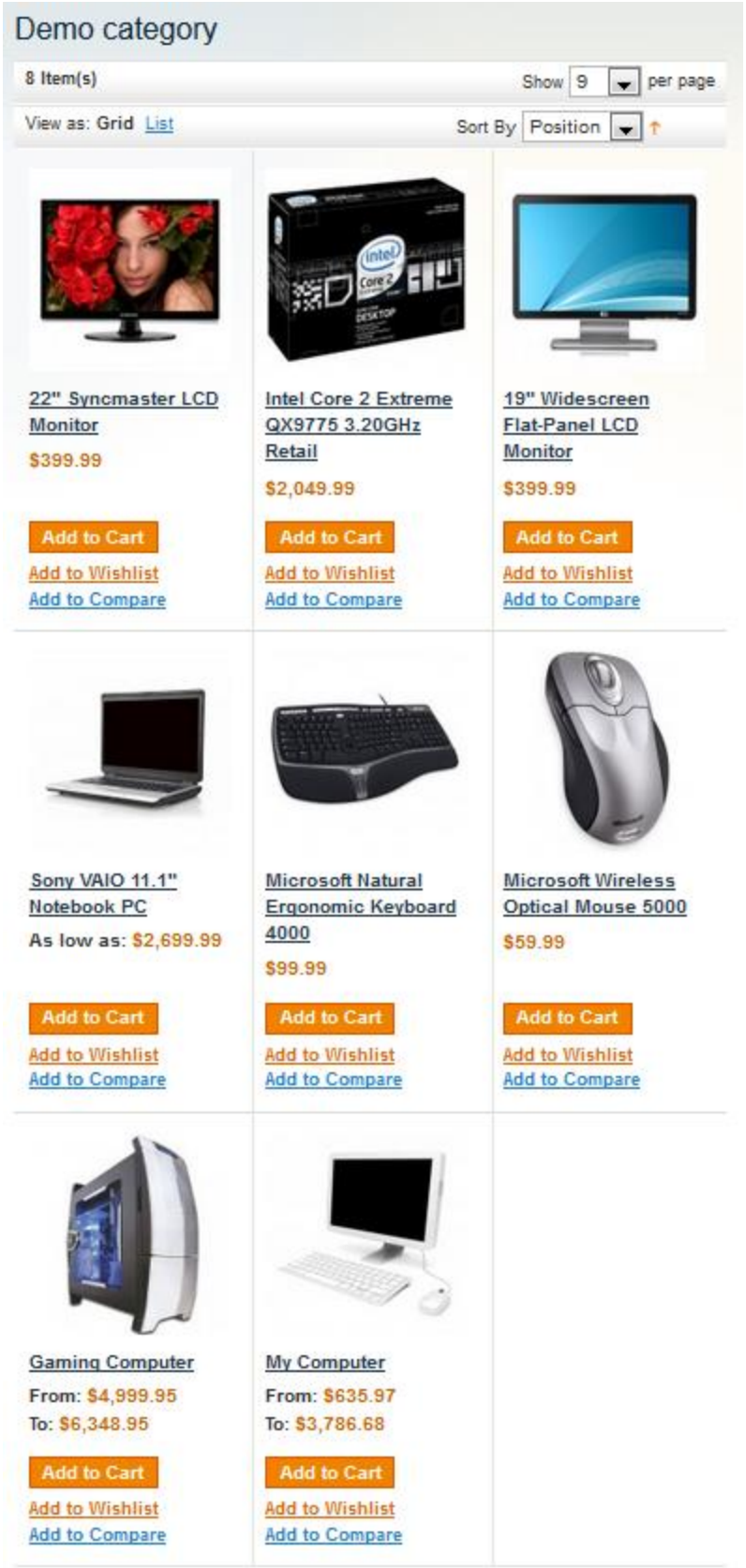



Figure 263. Category Page

# 18 Getting Help

Magento CE offers a variety of options and possibilities, but also has a learning curve. Magento provides several resources for getting help discovering Magento CE and using it daily to attain your eCommerce objectives.

You can start with the **Search** field at the top of the community site found at http://www.magentocommerce.com, which provides results from the Magento forum, knowledge base, wiki, groups, and other resources.

If you are unable to find answers to your questions, try posting your question in the Magento Answers site and the Magento forums, where thousands of participants help each other with Magento issues.

### To access Magento Answers:

Go to http://www.magentocommerce.com/answers/ and log in or using the user name and password that you created before downloading Magento CE. (If you do not have a Magento user name, you can register for one from this page.) Follow the onscreen directions to ask your question.

### To access Magento forums:

Go to http://www.magentocommerce.com/boards and log in using the user name and password that you created before downloading Magento CE. Choose a forum that best matches your question.

If you found the answer yourself and were unable to find it elsewhere, please share it with others. Use the wiki or forums to write and share it.

There are also several other community features in addition to the forums described above that enable the exchange of ideas and help. They are:

- **Groups:** Link community members working on or interested in specific subjects, such as Designing For Magento and Drop Shippers.
- **Chat**: Provides a real time discussion with Magento community members.
- **Wiki**: Provides community editable pages for sharing ideas and findings, tutorials and information

The following lists other resources available to help you use get the most out of Magento:

## Knowledge Base

The Magento knowledge base is a Wiki that provides instructions published by Magento or community members in the form of guides and “how-to” articles.

At: http://www.magentocommerce.com/knowledge-base

## Webinar Archive

Up-to-date webinars are provided by Magento in which you can learn real-world tips and tricks in order to get the most out of your stores and promotions.

At: http://www.magentocommerce.com/media/webinar-archive

## Screen casts

Screen casts are presentation videos that can guide you through many of the Magento features.

At: http://www.magentocommerce.com/media/screencasts

## Magento Designer's Guide

The Magento Designer's Guide provides information for designers describing Magento concepts and design implementation in Magento.

At: http://www.magentocommerce.com/design_guide

## Magento Blog

The Magento Blog contains fresh updates describing new Magento releases, interesting showcases and events.

At: http://www.magentocommerce.com/blog

## Magento on Twitter

You can keep up with Magneto events and announcements by following Magento on Twitter.

At: http://twitter.com/magento

## Technical Documents and Magento Core API

These provide developers with information on how to develop Magento CE.

At: http://docs.magentocommerce.com/

Here you can find information about all Magento classes and functions.

At: http://www.magentocommerce.com/support/magento_core_api

Here you can find information and usage examples for calling Magento CE using an API. This enables easier integration of Magento CE with existing systems.

# Appendix: VAT ID Validation

All editions of Magento include a value-added tax (VAT) ID validation feature. The feature is intended for B2B merchants from the European Union (EU), where VAT is charged if a merchant and a customer are in the same country, and VAT is not charged if a merchant and a customer are in different countries within EU and both parties are EU-registered business entities.

VAT identification number (VAT ID) Validation enables store administrators to create more than one default customer group, which will be automatically assigned to each customer during account creation, address creation or update, and checkout according to the customer's VAT ID, and the customer's and merchant's location countries. This feature enables merchants to create different tax rules for intra-country (domestic) and intra-EU sales, and to apply the corresponding VAT amount automatically.

> **Note:** VAT-related tax rules do not influence other tax rules and do not prevent applying other tax rules where applicable. Only one tax rule can be applied at a given time.

Magento performs VAT ID validation using the web-services of the European Commission server: http://ec.europa.eu/taxation_customs/vies/.

## VAT ID Validation Quick Reference

The following table lists the main tasks concerned with the VAT ID Validation feature and the locations, where they can be performed in the Admin Panel.

| TASK | ADMIN MENU | SCOPE |
|---|---|---|
| Create customer groups, which can be used as default for the VAT ID Validation functionality | **Customers** > **Customer Groups** | |
| Enable the VAT ID Validation functionality | **System** > **Configuration** > CUSTOMERS > **Customer Configuration** > **Create New Account Options** | Store view |
| o Set the default groups for customers from your country and from other EU countries | **System** > **Configuration** > CUSTOMERS >**Customer Configuration** > **Create New Account Options** | Store view |
| o Set your country and VAT ID | **System** > **Configuration** > **GENERAL** > **General** > **Store Information** | Store view |
| o Modify Magento list of EU countries | **System** > **Configuration** > GENERAL > **General** > **Countries Options** | Global |
| o Edit the VAT Number customer address attribute | **Customers** > **Attributes** > **Manage Customer Address Attributes** | Global |
| o Create tax rates and tax rules for domestic, intra-EU and other VAT-related customer groups | **Sales** > **Tax** | |

For assigning groups to customers, the default customer's address (billing or shipping) for tax calculation is used; the setting is configured under **System** > **Configuration** > CUSTOMERS > **Customer Configuration** > **Create New Account Options** > **Tax Calculation Based On**).

If the VAT ID Validation feature is enabled, you can still choose not to apply it for a certain customer by selecting the correspondent check box on the Customer Information page under **Customers** > **Manage Customers**.

# Configuring VAT ID Validation

Configuring the VAT ID Validation includes these steps:

1. Creating VAT-related customer groups.
2. Creating tax classes, tax rates and tax rules.
3. Configuring the VAT ID Validation settings.
4. Setting your VAT ID and location country.
5. Modifying the list of EU member countries used by Magento. This step is only necessary if the EU gets new members or some countries leave the EU.

## Creating the VAT-Related Customer Groups

VAT ID Validation functionality automatically assign one of the four default customer groups to customers according to VAT ID validation results:

- Domestic
- Intra-EU
- Invalid VAT ID
- Validation error.

You can create new customer groups to be used in the VAT ID Validation functionality or use existing groups, if they comply with your business logic. Customer groups are created under **Customers** > **Customer Groups**.

When configuring the VAT ID Validation functionality, you will need to assign each of the created customer groups as a default for customers with appropriate VAT ID validation results. For details see the Enabling and Configuring the VAT ID Validation Functionality section further.

## Configuring the VAT-Related Tax Rules

The VAT ID Validation functionality was implemented to facilitate the VAT applying for EU B2B merchants. In Magento, taxes are applied using the tax rules mechanism. Each tax rule is defined be three entities:

- Customer Tax Classes
- Product Tax Classes
- Tax Rates.

To use the VAT ID Validation functionality effectively, you need to create the appropriate tax rules.

**Important Note:** According to the EU taxation policy, the supply of services between businesses (B2B services) is in principle taxed at the customer's place of establishment (http://ec.europa.eu/taxation_customs/taxation/vat/how_vat_works/vat_on_services/index_en.htm ). So if you sell downloadable or virtual products, which do not require shipping, the VAT rate of a customer's location country should be applied for both, intra-union and domestic sales.

It means that you additionally need to create individual tax rules for a product tax class corresponding to the downloadable and virtual product types.

The following table contains the minimal list of tax rules which must be created to use the VAT ID Validation functionality.

| Tax rule # | Customer Tax Class | Product Tax Class | Tax Rate |
|---|---|---|---|
| 1 | • A class for domestic customers<br>• A class for customers with invalid VAT ID<br>• A class for customers, for whom VAT ID validation failed | A class for products of all types, except bundle and virtual | VAT rate of the merchant's country |
| 2 | A class for intra-union customers | A class for products of all types, except downloadable and virtual | VAT rates for all EU countries, except merchant's country. Currently this rate is 0% |
| 3 (required only if you sell products of bundle or virtual type) | • A class for domestic customers<br>• A class for customers with invalid VAT ID<br>• A class for customers, for whom VAT ID validation failed | A class for downloadable and virtual product types | VAT rate of the merchant's country |
| 4 (required only if you sell products of bundle or virtual type) | A class for intra-union customers | A class for downloadable and virtual product types | VAT rates for all EU countries, except merchant's country. Currently this rate is 0% |

**Note:** It is recommended that you apply the merchant's VAT rate for customers with invalid VAT IDs and those for which validation fails.You can create other tax rules and apply other tax rates according to your business logic.

In the Magento Admin Panel, all tax rule related entities, including tax rules, tax rates, product tax classes and customer tax classes, are managed under **Sales** > **Tax**; tax classes are assigned to customer groups under **Customers** > **Customer Groups** > *%customer group%.*

## Enabling and Configuring the VAT ID Validation Functionality

### To enable VAT ID and set default groups:

1. Log in to the Magento Admin Panel.
2. Navigate to **System** > **Configuration** > CUSTOMERS > **Customer Configuration**.
3. In the **Current Configuration Scope** field in the upper-left corner leave **Default Config** or select the desired store view.
4. Expand the **Create New Account Options** field set.
5. In the **Enable Automatic Assignment to Customer Group** field, select **Yes**. The following fields appear:
   - **Tax Calculation Based On:** Choose whether VAT calculation will be based on customer's shipping or billing address. If the customer does not have a shipping address (that is, the customer has only now registered and the system does not yet take into account the customer's shipping address), the Default Tax Destination Calculation address will be used for tax calculation to be displayed to the customer.

**Important Note:** If the **Tax Calculation Based On** is set to **Shipping Address**, then Magento will use billing address for VAT calculation, if a customer only buys downloadable and/or virtual products.

   - **Group for Valid VAT ID – Domestic:** Choose a customer group, which is automatically assigned to customers coming from your country and whose VAT ID is valid. See "Configuring Additional Settings for the VAT ID Validation Feature," page279, for details about setting your location country.
   - **Group for Valid VAT ID - Intra-Union** - Choose a customer group, which is automatically assigned to customers coming from EU countries other than yours, and whose VAT IDs are valid. See "Configuring Additional Settings for the VAT ID Validation Feature," page 279, for details about where your location country is set.
   - **Group for Invalid VAT ID:** Choose a customer group, which is automatically assigned to customers whose VAD ID is invalid.

- **Validation Error Group:** Choose a customer group, which is automatically assigned to customers for whom the VAT ID validation failed.
- **Validate on Each Transaction:** Choose whether VAT ID validation will be performed each time during order creation even if a previously saved customer address with validated VAT ID is used. The option applies to one-page checkout in the frontend only. If a new customer address is used (including guest checkout or if a customer has no address assigned to their account), then the validation is performed irrespective of this setting. During order creation in the Admin Panel, no automatic validations are performed.
- **Default Value for Disable Automatic Group Changes Based on VAT ID** (available only if **Default Config** is selected in **Current Configuration Scope**): Choose whether the automatic change of customer group based on VAT ID will be enabled or disabled by default. The setting can be overridden on the product level. The setting influences the system behavior in the following situations:

  i. The VAT ID of the customer's default address or the whole default address changes.
  ii. Customer group change was emulated during the checkout for a registered customer who had no previously saved address or for a customer, who registered during the checkout.

  If the automatic group change is enabled, then in the first case the customer group changes automatically, and in the second case the temporarily emulated customer group is assigned to customer.
  If the automatic group change is disabled, the customer group that is assigned assigned never changes, unless an administrator changes it manually.
- **Show VAT Number on Frontend:** Choose whether the field for entering and storing the VAT ID number will be visible in the frontend.

6. To save the settings, click **Save Config**.

If the VAT ID Validation feature is disabled (the **Enable Automatic Assignment to Customer Group** field set to **No**), then the system behavior is as usual, and the default customer group can be set in the **Default Group** field.

When the feature is enabled, the system does not automatically validate customer VAT IDs nor does it change customer groups.

## Configuring Additional Settings for the VAT ID Validation Feature

### To set your VAT ID and location country:

1. Navigate to **System** > **Configuration** > GENERAL > **General**.
2. In the **Current Configuration Scope** field, select the desired store view.

3. Expand the **Store Information** field set.
4. In the **Country** field, select your country.
5. In the **VAT Number** field, enter your VAT number. You can validate the entered value by clicking the **Validate VAT Number** button. The result of validation will be displayed immediately.

   **Note:** If your VAT number is valid, then apart from validation result for each customer's VAT ID validation, the validation server will send to Magento the following additional information: VAT request identifier and VAT request date. If a customer's VAT validation is performed during checkout, then the VAT request identifier and VAT request date are saved in the Comments History section of the Order View page under **Sales** > **Orders** > (select appropriate order).

6. To save the settings, click **Save Config**.

### To modify the list of the countries that are EU members:

1. Navigate to **System** > **Configuration** > GENERAL > **General**.
2. In the **Current Configuration Scope** field, select the desired store view.
3. Expand the **Countries Options** field set.
4. In the **European Union Countries** field make the necessary changes in the list of countries that are EU members.
5. To save the changes, click **Save Config**.

# VAT ID Validation Implementation Details: Customer Experience

## Assigning Customer Groups Based on VAT ID Value during Registration

If the VAT ID Validation feature is enabled, after registration each customer is proposed to enter the VAT ID number. However only those who are registered VAT customers are expected to fill this field.

After a customer specifies the VAT number and other address fields, and chooses to save, the system saves the address and sends the VAT ID validation request to the European Commission server. According to the results of the validation, one of the default groups is assigned to a customer. This group can be changed if a customer or an administrator changes the VAT ID of the default address or changes the whole default address. And the group can be temporarily changed (group change will be emulated) in some cases during one-page checkout.

## Applying and Assigning Customer Groups During Checkout

The system behavior concerned with the VAT ID validation and the customer group change during the checkout depends on how the **Validate on Each Transaction** and the **Disable Automatic Group Change** settings are configured. This section describes the implementation of the VAT ID Validation functionality for the checkout on the frontend.

In case a customer uses Google Express Checkout, PayPal Express Checkout or another external checkout method, when the checkout is performed completely on the side of the external payment gateway, the **Validate on Each Transaction** setting cannot be applied. Thus the customer group cannot change during checkout.

The following diagram illustrates the flow of VAT ID validation and customer group change during one-page checkout.

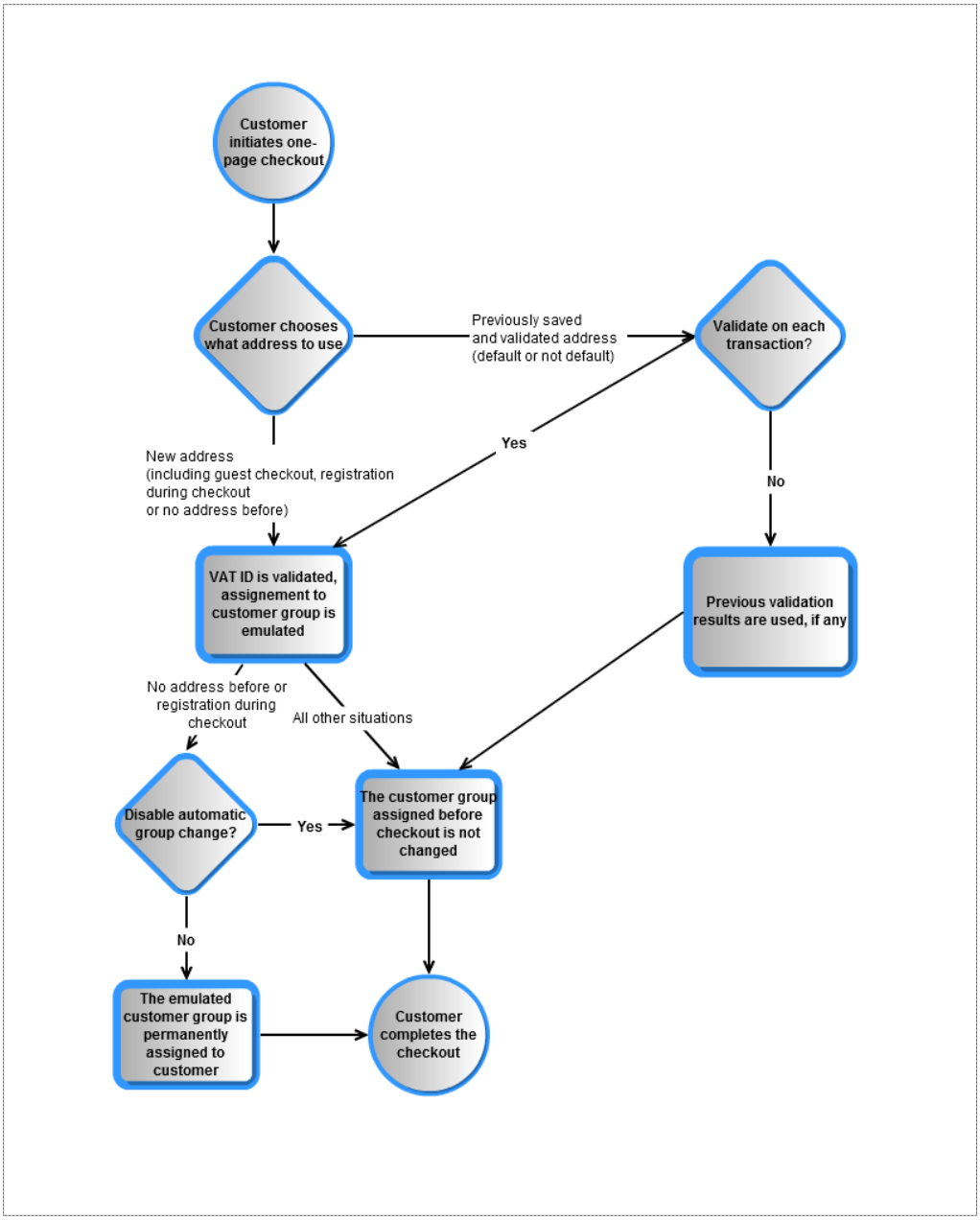

Customer initiates one-page checkout
Customer chooses what address to use
Previously saved and validated address (default or not default)
Validate on each transaction?
New address (including guest checkout, registration during checkout or no address before)
Yes
No
VAT ID is validated, assignement to customer group is emulated
Previous validation results are used, if any
No address before or registration during checkout
All other situations
Disable automatic group change?
Yes
The customer group assigned before checkout is not changed
No
The emulated customer group is permanently assigned to customer
Customer completes the checkout

Figure 264. One-page checkout with VAT ID validation

# VAT ID Validation Implementation Details: Admin Experience

## The *VAT Number* Customer Address Attribute

Customer VAT ID value is stored in the **vat_id** customer address attribute. The default label of this attribute is **VAT number**. Customer address attributes are managed under **Customers** > **Attributes** > **Manage Customer Address Attributes**.

The **VAT number** field is always present in all shipping and billing customer addresses in the backend. It is not mandatory. Displaying the field in the frontend is configured in the **Show VAT Number in Frontend** field under **System** > **Configuration** > CUSTOMERS > **Customer Configuration** > **Create New Account Options**.

**Note:** For customers not from the EU countries, consider storing the VAT number (if any), in the existing ***Tax/VAT Number*** customer attribute to avoid any possibility of customer group change (whether persistent or emulation during checkout). It is recommended that you rename the ***Tax/VAT Number*** customer attribute to avoid confusion with the new ***VAT Number*** customer address attributte that is used for the VAT ID Validation functionality.

## Disabling Automatic Customer Group Change

When the VAT ID Validation functionality is enabled, the group of a customer can only be changed manually in the Admin Panel, no automatic changes of customer group can take place.

When the VAT ID Validation functionality is enabled, the system will automatically, permanently change a customer group in the following situations:

- The VAT ID of the customer's default address or the whole default address changes.
- The customer group change was emulated during the checkout for a registered customer who had no previously saved address, or a customer who registered during the checkout.

The automatic customer group change can be disabled by selecting the **Disable automatic group change** check box on the customer's page under **Customers** > **Manage Customers** > %customer% > **Account Information**. See Figure 265.

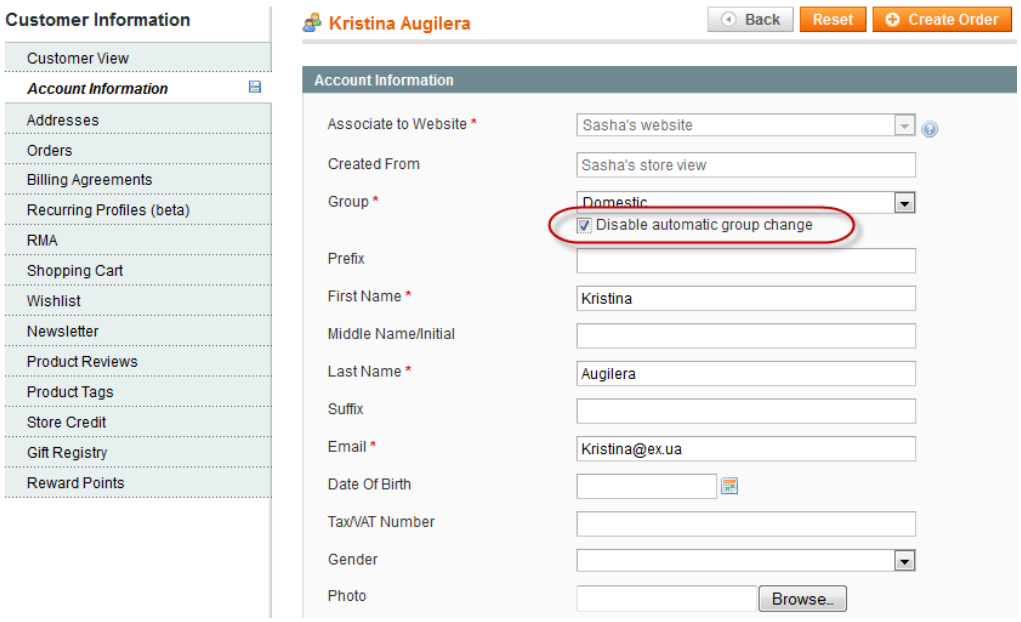



Figure 265. Disabling automatic group change on customer level

**Important Note**: The setting does not influence the emulation of the customer group change during checkout.

The default value of the **Disable automatic group change** check box is set in the **Default Value for Disable Automatic Group Changes Based on VAT ID** field under **System > Configuration >** CUSTOMERS **> Customer Configuration > Create New Account Options**. The configuration setting is made on the global level. The default value applies to new customers and to customers whose records are available in the system when the VAT ID Validation functionality is enabled for the first time.

## VAT ID Validation in Customer Accounts in the Admin Panel

When an administrator adds a new default address with a VAT ID to the account of a new or existing customer or changes the VAT ID of the existing default address, the system validates the VAT ID and assigns the appropriate customer group to the customer. The validation is performed after the **Save** or **Save and Continue** button is clicked.

**Note**: The system behavior is as described when the VAT ID Validation functionality is enabled and configured.

If you want to disable the automatic change of a customer group, select the **Disable automatic group change** check box on the **Account Information** tab of the Customer Information page.

# VAT ID Validation During Order Creation in the Admin Panel

This section describes the system behavior when an admin creates a new order in the Admin Panel, with the VAT ID Validation functionality enabled and configured.

During order creation in the Admin Panel no VAT ID validation is performed automatically. To validate the VAT ID of the customer address, an administrator needs to click the **Validate VAT Number** button in the **Billing Address** or **Shipping Address** section of the Create New Order page. See Figure 266.

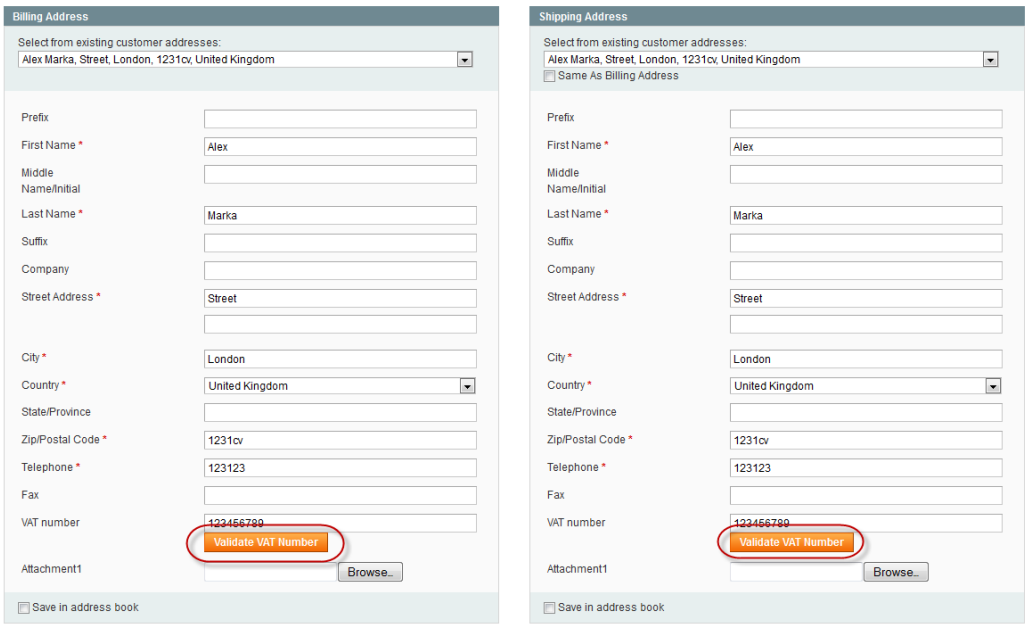



**Figure 266. Validating customer VAT ID during order creation in the Admin Panel**

After the validation, the administrator receives a notification about the validation results in the form of a pop-up message.

A customer group, which should be assigned to a customer according to the validation results, can differ from the customer group that is currently assigned to the customer. In this case the system displays a dialog box suggesting that the administrator confirm or reject the group change emulation for the customer's current order. If the administrator confirms, then the group change is emulated for the current order and the corresponding VAT rate is applied (if the corresponding tax rule is configured in the system). The actual customer group of a customer is not changed.

If a new customer account is added during the order creation, and an administrator confirms using the customer group that corresponds to the VAT ID validation results, then after the order creation the customer account is saved in the system and the customer group that was used for order creation is assigned to it.

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